CHIRP

Children and Hoosier Immunization Registry Program

User's Guide
September 2002, Version 2.6.2

Indiana State Department of Health

"Working for Hoosier Health - a Lifetime Investment!"

http://chirp.isdh.state.in.us

System Requirements

	Minimum Requirements:	**Suggested Requirements:**
Processor	100 MHz	300MHz or more
RAM	32 MB	128 MB or more
Hard Drive Space	N/A	N/A
Modem	9600 Baud, or	56K, DSL, Cable, or
Network	Ethernet Card, (connection to the Internet through a LAN/WAN)	Ethernet Card, (connection to the Internet through a LAN/WAN)
Video	256 colors	True Color (24 bit)
Browser	Internet Explorer V6	Internet Explorer V6
Operating System	N/A	N/A

Disclaimer: Information in this document explains many features that are not used by all clients. The example organizations, products, people and events depicted herein are fictitious. No association with any real organization, product, person or event is intended or inferred. Complying with all applicable copyright laws is the responsibility of the user. For more information on features represented in this manual that are not used by the client, contact the local state immunization coordinator.

Table of Contents

SYSTEM REQUIREMENTS I

1 IWEB2000 BASICS 1-1
1.1 IWEB DATA RULES AND TIPS 1-2
1.2 IWEB MENU - LOGIN 1-5

2 SETTING UP THE TOOLBOX 2-1
2.1 ABOUT THE TOOLBOX 2-1
2.1.1 Automatic Ownership Blocking 2-1
2.2 TOOLBOX MENU – FACILITIES 2-2
2.2.1 Adding Facilities 2-2
2.2.2 Editing Facilities 2-3
2.3 TOOLBOX MENU – PHYSICIANS/VACCINATORS 2-5
2.3.1 Adding New Physicians/Vaccinators 2-5
2.3.2 Editing Physicians/Vaccinators 2-7
2.4 TOOLBOX MENU - LOT NUMBERS 2-9
2.4.1 Adding a Lot Number 2-9
2.4.2 Editing a Lot Number 2-10
2.4.3 Adjusting Doses 2-13

3 SETTINGS MENU 3-1
3.1 ABOUT SETTINGS 3-1
3.2 SETTINGS MENU - PERSONAL 3-2
3.3 SETTINGS MENU - FORECAST 3-5
3.4 ADMINISTRATIVE SETTINGS 3-6
3.4.1 Archive Age 3-6
3.4.2 Normal Login Times 3-6

4 PATIENT MENU 4-1
4.1 PATIENT MENU - SEARCH/ADD 4-1
4.1.1 Patient (basic information) 4-2
4.1.2 Patient (unique I.D.'s) 4-2
4.1.3 Family 4-2
4.1.4 Address 4-2
4.1.5 Searches 4-3
4.1.6 Searching by Bar Code 4-7
4.1.7 Programs 4-9
4.1.8 Other Buttons 4-10
4.2 PATIENT MENU – SEARCH RESULTS 4-10
4.3 PATIENT MENU – DEMOGRAPHICS 4-10

5 VACCINATION MENU 5-1
5.1 VACCINATIONS MENU - HISTORY 5-1
5.1.1 Administered Shot Date 5-2
5.1.2 Historical (Non-Administered) Shot Date 5-2
5.1.3 Adverse Reaction 5-2
5.1.4 Invalid Vaccination 5-2
5.1.5 Adding Common Vaccinations 5-3
5.1.6 Adding Other Vaccinations 5-5
5.1.7 Adding Historical Vaccines 5-8
5.1.8 Adding Contraindications 5-9
5.2 VACCINATIONS MENU - FORECAST 5-10
5.3 VACCINATIONS MENU – SUMMARY 5-10

6 REPORTS MENU 6-1
6.1 REPORTS MENU - PATIENT RECORD 6-1
6.2 REPORTS MENU - REPORT MODULE 6-2
6.2.1 Vaccinations 6-3
6.2.2 Patients 6-5
6.2.3 Vaccines for Children 6-8
6.2.4 Site Information 6-10
6.2.5 Administrative 6-12
6.3 REPORTS MENU - STATE REPORTS 6-13
6.4 REPORTS MENU - MANAGEMENT REPORTS 6-13

7 CASA EXPORT 7-1
7.1 ABOUT WINCASA 7-1
7.2 USING CASA EXPORT 7-1
7.3 USING WINCASA 7-3

8 REMINDER RECALL 8-1
8.1 REMINDER RECALL BASICS 8-1
8.1.1 Do Not Increment Recall Count 8-1
8.1.2 Recall Date Range 8-1
8.1.3 Maximum Recall Tries 8-2
8.1.4 Limit Recall Group By 8-2
8.1.5 Vaccine Families To Recall 8-3
8.1.6 Name of Person Running Recall 8-3
8.2 RUN REMINDER RECALL 8-4
8.2.1 Output Type 8-5

9 EXPORTS MENU 9-1
9.1 ABOUT EXPORTS 9-1
9.2 EXPORTS MENU - HL7/SIIS 9-1
9.3 EXPORTS MENU - DTT 9-2
9.4 EXPORTS MENU - PCIC 9-3

10 UFM - USER FEEDBACK MODULE 10-1
10.1 DAILY STATUS REPORT 10-1
10.2 WEEKLY STATUS REPORT 10-2
10.3 BAD LOGIN REPORT 10-2
10.4 DATA QUALITY REPORT 10-3

11 HELP MENU 11-1
11.1 ABOUT THE HELP MENU 11-1

A. APPENDIX - INACTIVATING RECORDS A-1

B. APPENDIX - STATE REPORTS B-1

C. APPENDIX - MANAGEMENT REPORTS C-1

D. APPENDIX - USER INFORMATION ACCESS D-1

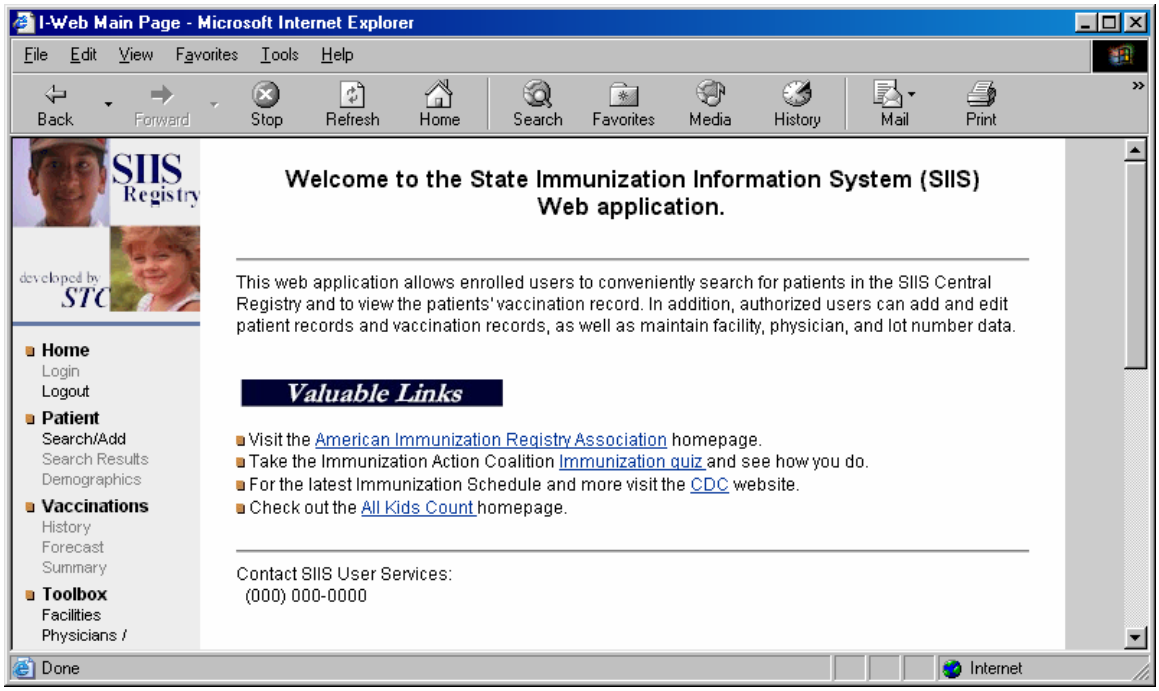
GLOSSARY OF TERMS ..... A

1 IWeb2000 Basics

IWEB2000 is a featured State Immunization Information System. It provides patient immunization resource management and administration tools that work together to help graphically perform patient immunization management tasks.

Using IWEB2000, patient immunization data can now be visually accessed and presented in powerful new ways via the Internet. IWEB2000 includes customer-built forms, reports, exports, and a graphical user interface that allows a graphic presentation of patient vaccination records. The application allows authorized users to conveniently search for patients in the central registry, add or modify patient and vaccination records, facilities, physicians, vaccine lot numbers, create reports, run reminder/recall, and send exports to the central registry.

This manual introduces IWEB2000 and its functionality. The design focuses on features of IWEB2000 to help convey how the application works. The concepts discussed in each chapter are to introduce the user to the program.



1.1 IWeb Data Rules and Tips

Certain fields take either numbers or letters. Some fields, like the address, may take both. Users must enter information into each field in the proper format. For example, if the user tries to enter letters in the Social Security field, they will get an error message in the top of the screen that tells them invalid characters in this field. Follow the guidelines, as shown below, to simplify using the application.

Capitalization

It is not necessary to use the Shift key to capitalize the first letter in data entry; the Web Application automatically capitalizes all letters when records are updated.

Dates

The date fields are formatted with the forward slash "/" symbol between the month, day, and year. The forward slash will automatically be entered into the field when adding dates.

Enter dates as month/day/year (mm/dd/yyyy), (mm/dd/yy), (mmddyyyy), or (mmddyy).

Social Security Number

The social security number (SSN) fields are formatted with the dash "-" symbol. The dash will automatically be entered into the field when adding the SSN.

Enter Social Security Numbers (SSN) as ###-##-####, or #########.

Phone or Fax Number

The phone and fax number fields are formatted with the parenthesis "()" for the area code and the dash "-" symbol between the prefix and the last four numbers. These symbols will automatically be entered when adding the phone and fax numbers.

Enter phone numbers as (###)###-####, or ##########.

Zip Codes

The zip code fields are formatted with the dash "-" symbol. The dash will automatically be entered into the field when adding zip codes with the zip plus four.

Enter zip codes as #####, or #####-####. If this data is entered incorrectly, an error message will immediately open to inform you of this error.

Tab Key

All the fields in the web application have a "tab" order. This means that when the cursor is in a field, by pressing the "Tab" key, it will move the cursor to the next field. Alternatively, by pressing "Alt + Tab", the cursor will move backwards through the "tab" order. This is helpful when entering data because the user does not have to constantly use the mouse.

Enter Key

The "Enter" key on the keyboard is used the same throughout the web application. By pressing the "Enter" key, the application executes the function associated with the

particular page that is currently active. For example, if the user is in the Patient Search screen, the "Enter" key will execute the search function.

Exception to this is if a button is highlighted by using the "Tab" key function, pressing the "Enter" key will execute whichever button is highlighted.

Backspace Key

The "Backspace" key on the keyboard is used the same throughout the web application. By pressing the "Backspace" key, the application returns to the prior screen. For example, if the user performs a search and the "Search Results" screen does not display the information the user wanted, they could return to the search screen by pressing the "Backspace" key.

Cut, Copy, & Paste

Many times, there is certain data that needs to be entered more than once. Here are a couple of ways to cut, copy, or paste data:

Note: *Not all functions work with every screen, or every computer. Try using different combinations to get the desired effect.*

- Cut (Item must be highlighted first) =
  - Control + x
  - Right click on mouse, select "Cut" from the menu
  - Select "Edit" from the toolbar then select "Cut" from the menu
  - Shift + Delete
- Copy (Item must be highlighted first) =
  - Control + c
  - Right click on mouse, select "Copy" from the menu
  - Select "Edit" from the toolbar then select "Copy" from the menu
  - Control + Insert
- Paste =
  - Control + v
  - Right click on mouse, select "Paste" from the menu
  - Select "Edit" from the toolbar then select "Paste" from the menu
  - Shift + Insert

Drop-down Menus

Drop-down menus are usually setup with pre-determined or hard-coded data for users to select. The normal use would be to click on the drop-down "arrow" to open the list, and then scroll through the list, looking for the item.

A shortcut for finding the needed value from the drop-down menu is to open the list and the press the letter on the keyboard for which the word begins. If the item is not found the first time the letter is pressed, press the same letter repeatedly until the desired item appears. This will work whether the list is alphabetical or not.

Checkboxes

A keyboard shortcut for using the checkbox is to "tab" to the checkbox, then press the spacebar. This will "check" or "uncheck" the highlighted box.

Radio Buttons

A keyboard shortcut for using the radio buttons is to "tab" to the desired set of radio buttons. Once the desired set of radio buttons are reached, use the directional "arrow" buttons on the keyboard to move the highlighted radio button from one to the next.

Scroll Mouse

If users are using a scroll mouse, the scrolling wheel can be used a couple of different ways if programmed correctly.

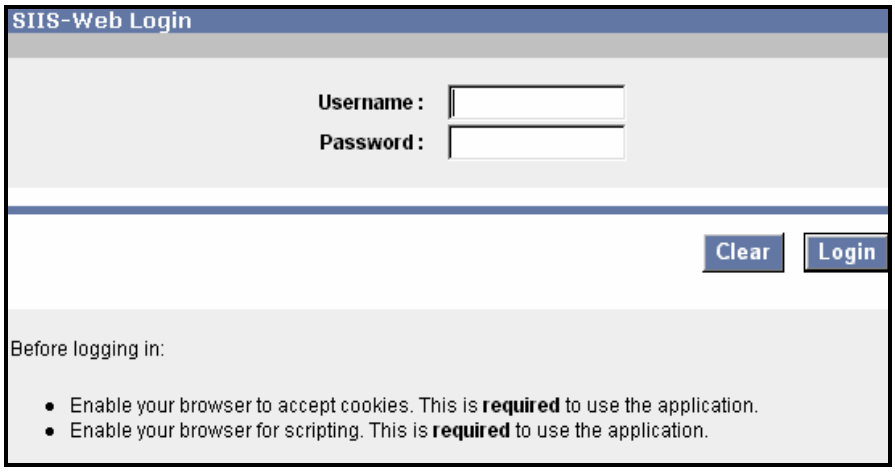
- Scroll through selected dropdown lists
- Scroll the current web page

1.2 IWeb Menu - Login

To start using the web application open Internet Explorer and enter the web address to the immunization web site established for your state, for example: *http://www.immunizationregistries.com/*.

Along the left side of the screen, the main menu appears. Available options will appear in bold. Until logged in, the only active link will be the "Login" link, which is shown in bold print. Click on the "Login" link to get to the login page.

Enter the user name and password assigned to you by the registry administrator. Once logged in, new user options will become available. Depending on the access level granted to the user, different items will be available.



Once logged in, the user can begin using the web application. If the user has "client" user rights, it is important to enter information using the Toolbox and Personal Settings first. The Toolbox allows the user to enter important facility information such as active lot numbers and vaccinators.

The Personal Settings menu allows the user to set default values that can be used as shortcuts during data entry. For more information about the Toolbox, refer to Section 2. For more information about Personal Settings, refer to section 3.

If you have "view" rights only, skip Section 2 and 3 and move to Section 4. From here, the search information is the same for "view" or "client" rights. If a user has "view" rights only, the application will not allow edits to returned information.

While any record is in edit mode, the patient's record will be locked from any other user accessing it. The user must "Cancel Edits" or "Logout". If the user fails to perform one of these steps before closing the application, the record will be locked until the session is timed out.

2 Setting Up The Toolbox

2.1 About the Toolbox

The Toolbox is used to maintain a list of current vaccine lot numbers and vaccinators for a facility. All of the values should be kept up to date. Reports can be generated for all of the variables entered.

First time users of the web application will need to enter in all the toolbox information pertaining to their facility or Immunization Record Management System (IRMS) number. The Toolbox is located in the main menu, on the left side of the web page. The specific items found in the web application toolbox include facilities (clinics), lot numbers, and physicians/vaccinators. Additionally, the detailed information that is entered is stored by IRMS number. This information can be seen or used only by personnel located at within an IRMS, depending on the access level granted to the user. If a user were reporting data to the central registry using the PCI Client Server Suite, the only data that will be available to them on the web is patient and vaccination data.

Records can only be inactivated, not deleted, once they have been entered into the Toolbox. The reason records cannot be deleted is that other records in the system reference them. To inactivate records, simply check the box titled "inactive".

Note: *The Facilities and Physicians/Vaccinators menu options are not available to all. If information needs to be updated pertaining to these items, contact the system administrator.*

2.1.1 Automatic Ownership Blocking

In both, the Facility and Physician/Vaccinator toolbox, users now have the option to block ownership of a patient record. Ownership of a record happens when a patient's record is last updated by a certain physician/vaccinator at a certain facility.

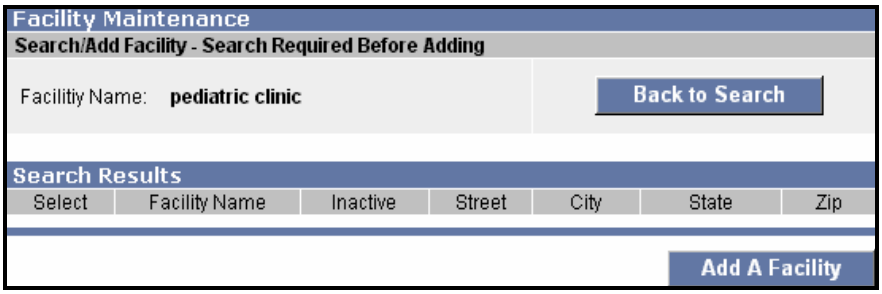
For example, a patient may belong to Dr. Smith. If this patient goes to a vaccination clinic and receives vaccinations, typically, the record is updated and now the patient's record now looks as though it belongs to the person, or facility, that gave the vaccinations. By checking the box "Automatic Ownership Blocked", the patient will still appear to belong to Dr. Smith.

2.2 Toolbox Menu – Facilities

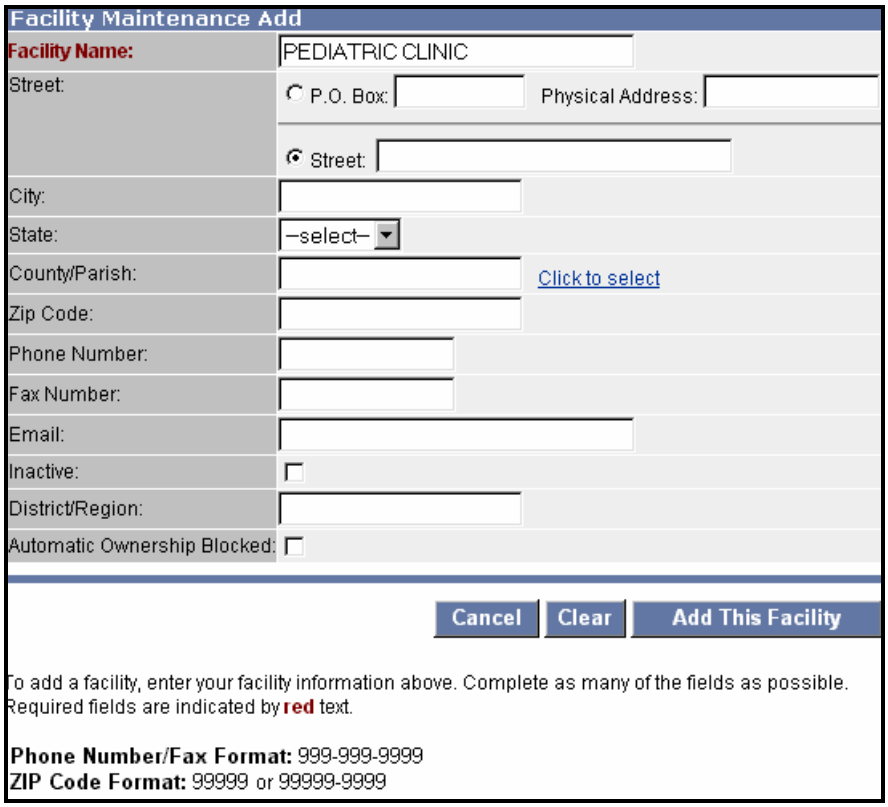
Facilities may be defined within the web application, in order to track a sub-group of patient records. For example, you may wish to identify those patients of "Pediatric Clinic". When printing a report, you can sort all the patients located in "Pediatric Clinic".

2.2.1 Adding Facilities

First time users of the application should enter all the current facility information pertaining to their organization. Any Facilities to be tracked are entered by selecting "Facilities" from the Toolbox menu. The "Facility Maintenance" screen makes it mandatory to search for a facility before adding one. Once the search is performed and the specific facility is not found, the user may choose to add one. If the facility is found, click on the arrow button located next to the clinic to do any edits, which is discussed in the following section.

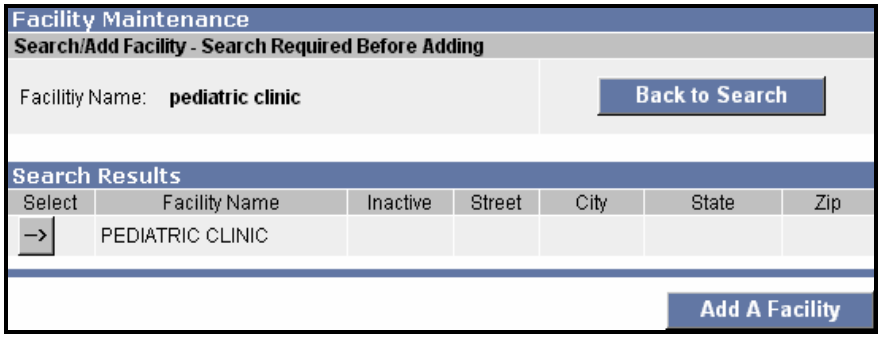


Click on the "Add A Facility" button. The "Facility Maintenance Add" screen will appear to enter information about the facility. The only required fields are those labeled in red. It is recommended that you enter as much information as possible to ensure complete and accurate record keeping. When finished, click "Add This Facility". You will be returned to the Facility Maintenance screen.

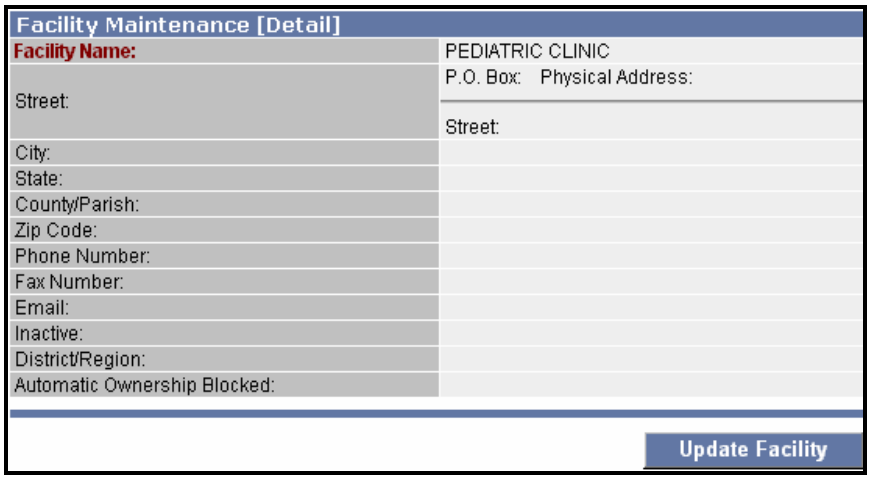


2.2.2 Editing Facilities

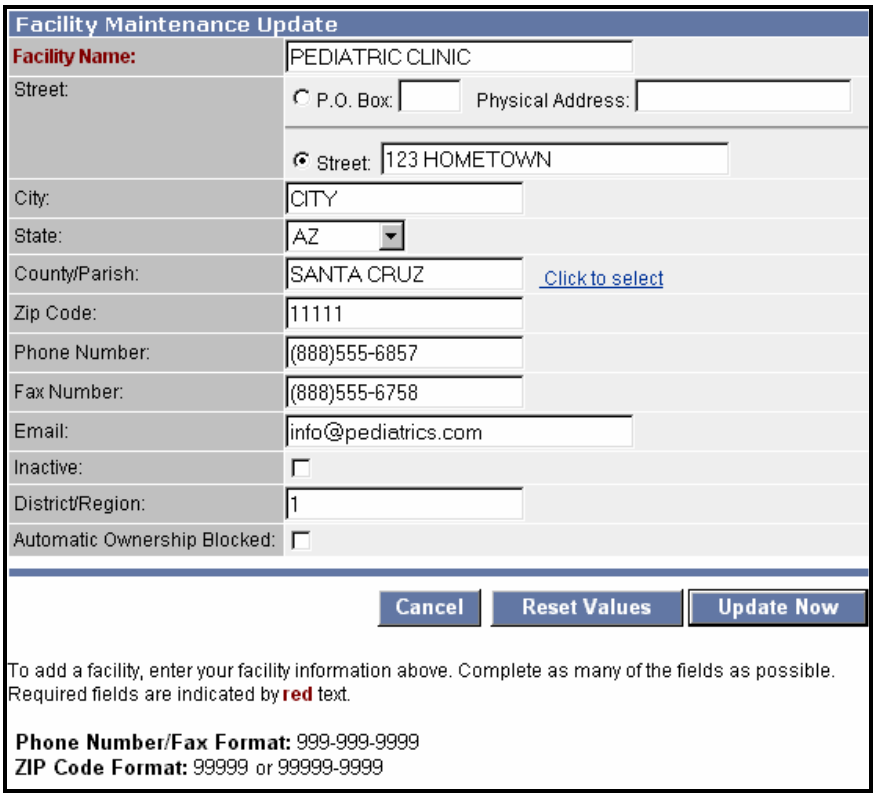
As with adding a facility, users must perform a search in order to view or edit a facility. Once the search has been completed, click on the arrow to the left of the facility name to enter the record.



After viewing the detailed facility information, click on the "Update Facility" button to edit the record.

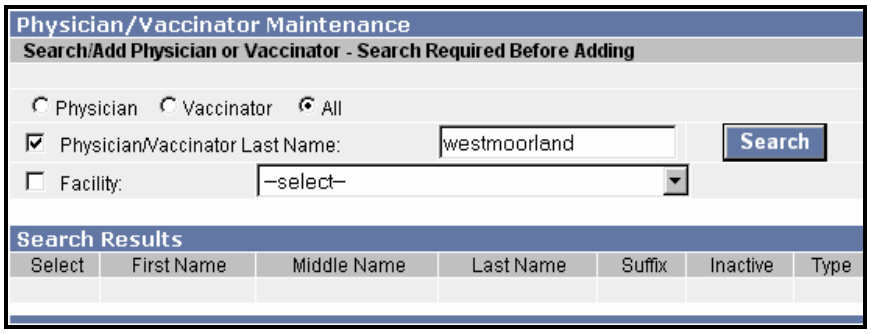


Once necessary edits are made, click the "Update Now" button to save all changes. Any changes can be undone by clicking on the "Cancel" or the "Reset Values" buttons. The "Cancel" button returns the user to the Facility Maintenance detail screen. The "Reset Values" button returns everything to its original value.



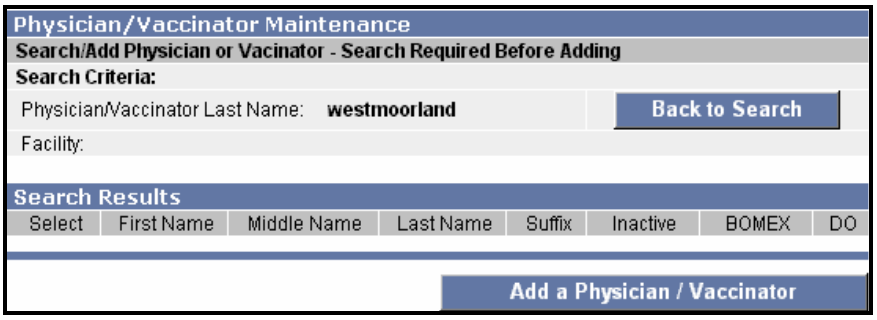
2.3 Toolbox Menu – Physicians/Vaccinators

All active physicians/vaccinators must be entered using the Toolbox. To enter Physicians and Vaccinators into the web application, select "Physicians/Vaccinators" from the toolbox menu. Only enter the names of people who work for your organization who will be administering vaccines, not every doctor in town!



2.3.1 Adding New Physicians/Vaccinators

The Physician/Vaccinator Maintenance screen requires a search before records can be added in an effort to reduce duplication. A screen will appear with the returned search results, if any meet the criteria. In order to add a new entry, click on the "Add a Physician/Vaccinator" button or click on "Back to Search" to conduct another search.

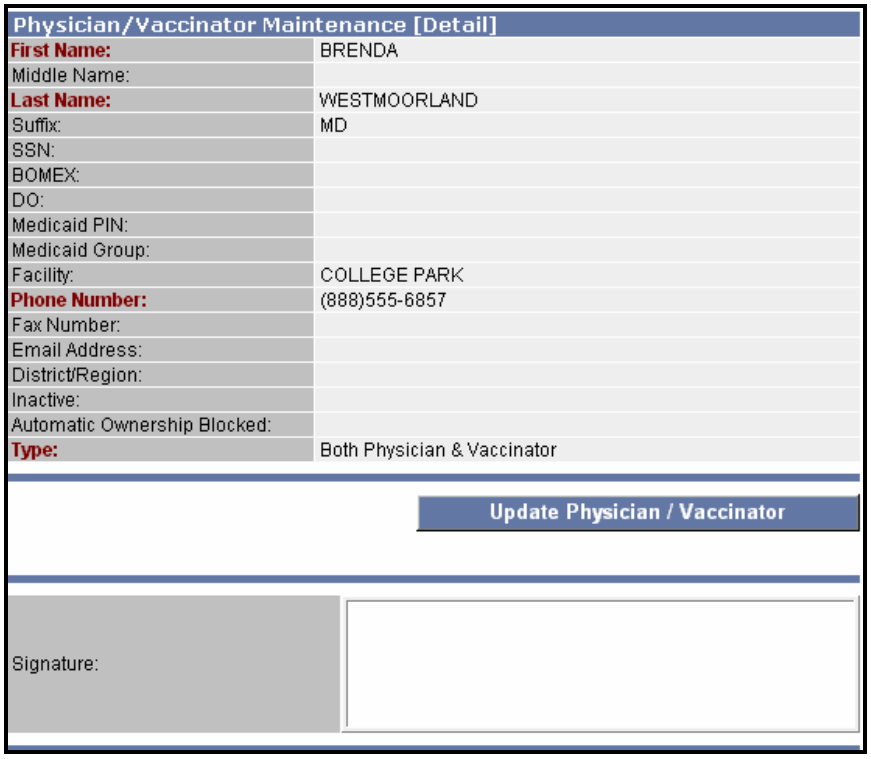


The only required fields are those labeled in red. It is recommended that you enter as much information as possible.

When all key information has been entered, click on the "Add This Physician/Vaccinator" button. You will be returned to the Physician Maintenance screen and the information will be saved.

2.3.2 Editing Physicians/Vaccinators

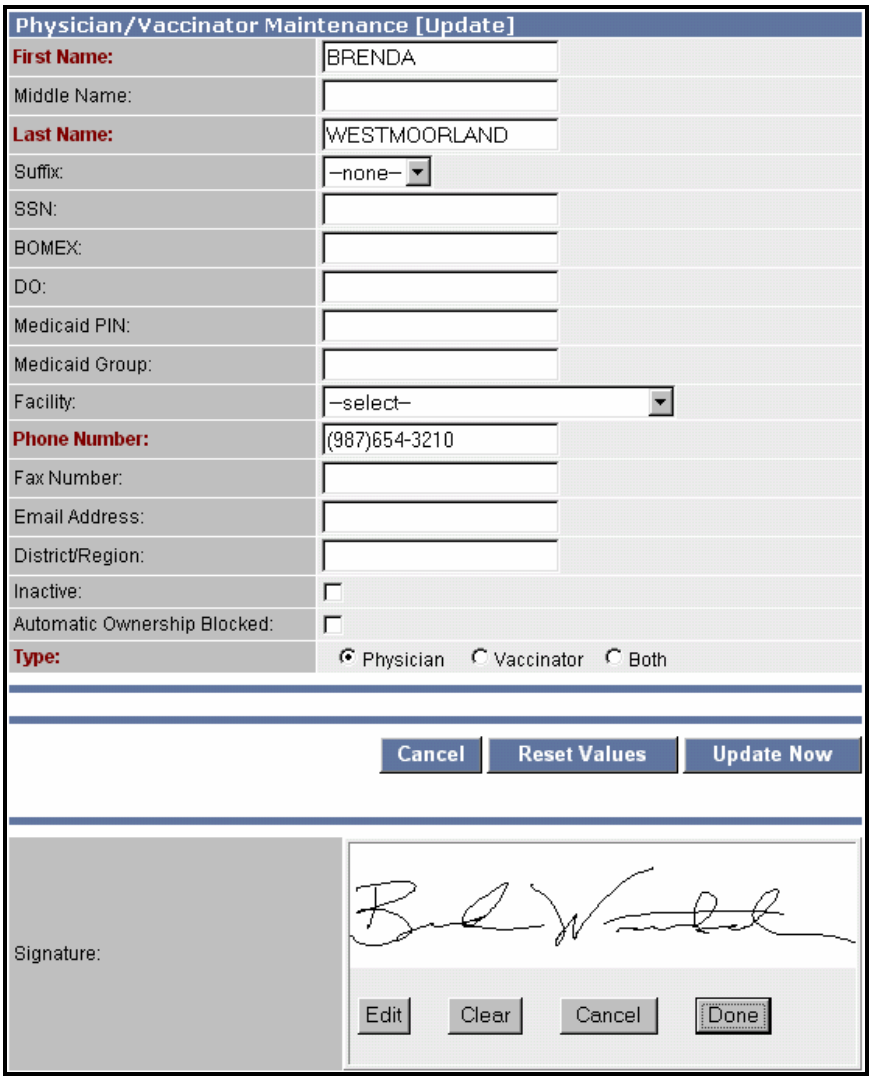
To edit information for a current Physician/Vaccinator in the system, a search must be performed. Selecting the facility the Physician/Vaccinator is associated with can narrow the search. Click the "Search" button. Once the search results are returned, click the arrow button located to the left of the Physician's or Vaccinator's name. A "Physician/Vaccinator Maintenance Detail" screen appears. Check the detail information to make sure this is the record you wish to edit. If so, click on the "Update Physician/Vaccinator" button.



A screen will appear for you to start editing information about the Physician/Vaccinator. When the information has been entered, click on the "Update Now" button. If you wish to cancel your changes, you can select the "Cancel" button, which will return you to the "Physician/Vaccinator Maintenance" screen. If you wish to undo the changes, click the "Reset Values" button and reenter the new information.

To add a signature for the physician/vaccinator, while in edit mode, click on the "Edit" button below the signature block. Once finished writing the signature, click the "Done" button. To start the signature over, click the "Clear" button. To cancel adding a signature, click the "Cancel" button.

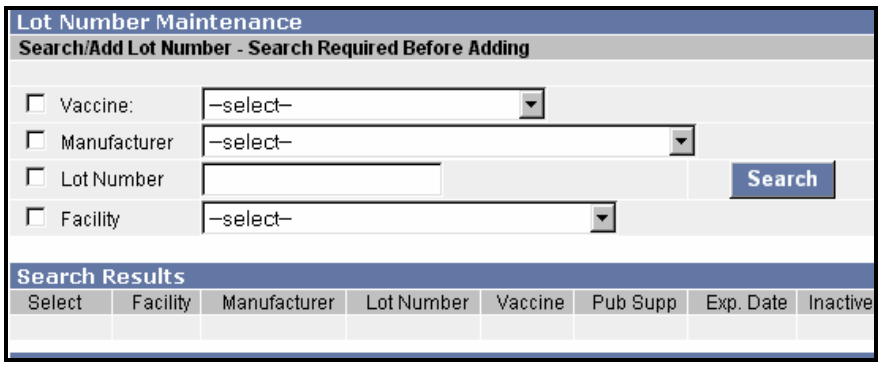
When finished adding the signature to the toolbox, click on the "Update Now" button. This will save any information changed in this record.



2.4 Toolbox Menu - Lot Numbers

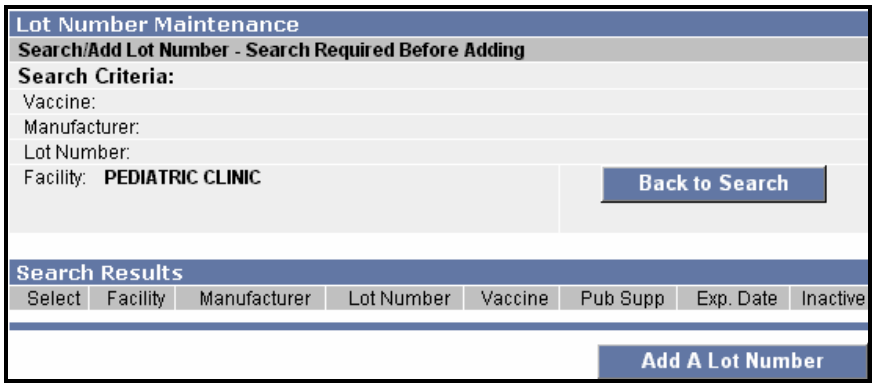
First time users should enter all of the current lot numbers in use at the facilities (clinics). Any lot numbers to be tracked can be entered by selecting "Lot Numbers" from the Toolbox menu.

The "Lot Number Maintenance screen" provides four options for searching for lot numbers. If more than one option is selected, it will narrow the search. If no options are selected, the search will return all lot numbers in the registry database associated with the user's facility.



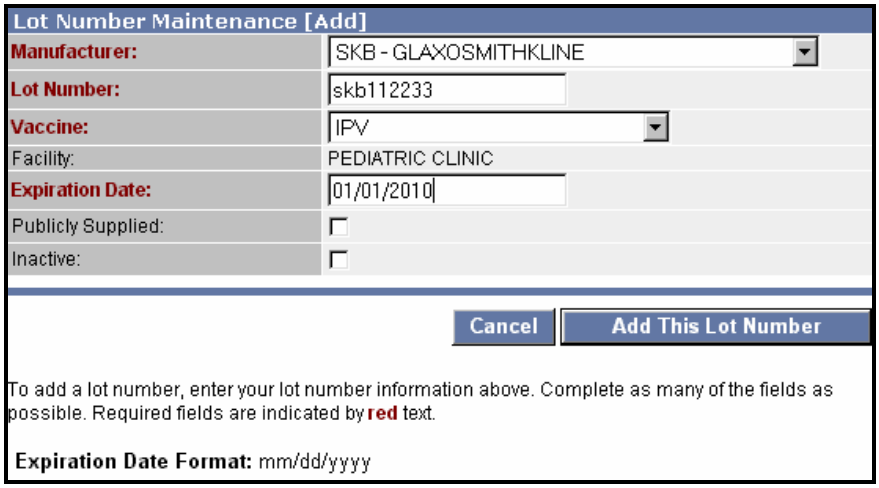
2.4.1 Adding a Lot Number

Make the appropriate selections then click on the "Search" button. A screen will appear with the returned search results. From this screen, you can select one of the returned results, for edit purposes, or click on "Add A Lot Number", or return to the search screen by clicking the "Back to Search" button.



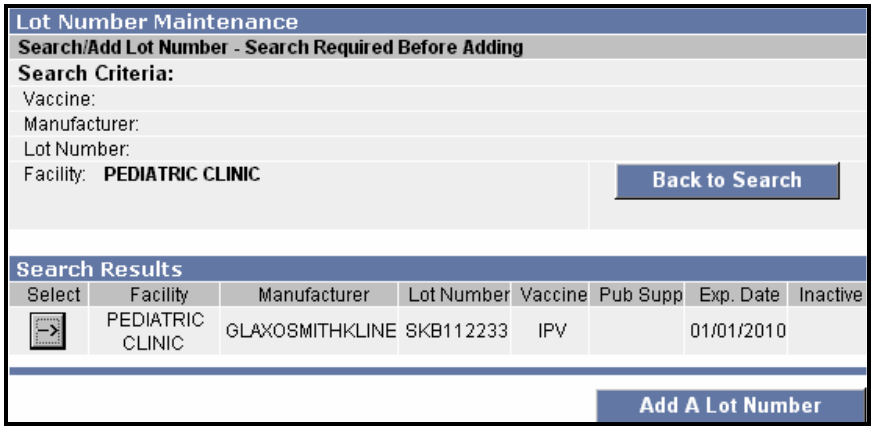
If you click on "Add A Lot Number", the following screen will appear. From here, you can start entering information about the lot number. Required fields are labeled in red. It is recommended that you enter as much. When you are finished, click on the "Add This Lot Number" button. You will be returned to the "Lot Number Maintenance" screen.

Note: *If a lot number has an expiration date that only includes a month and year, but no day, you should use the last day of the expiration month to complete the expiration date.*

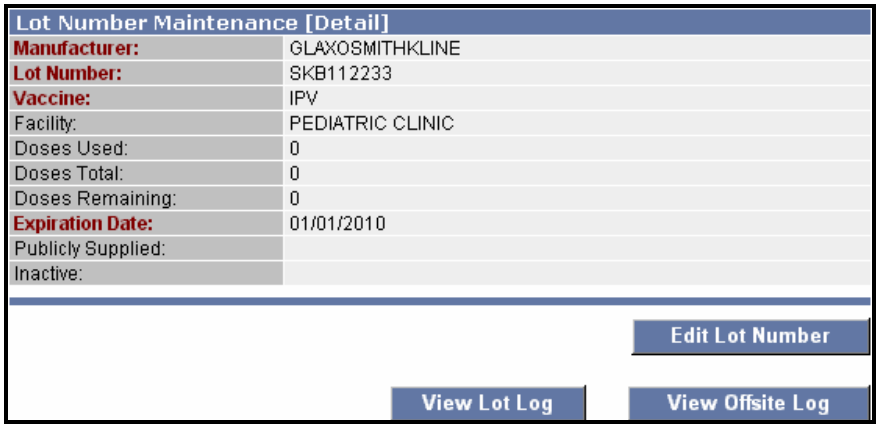


2.4.2 Editing a Lot Number

Make the appropriate selections then click on the "Search" button. A screen will appear with the returned search results. From this screen, select one of the returned results by clicking on the arrow button to the left of the facility name. Once you click the arrow, you will be in the "Lot Number Maintenance Detail" screen.



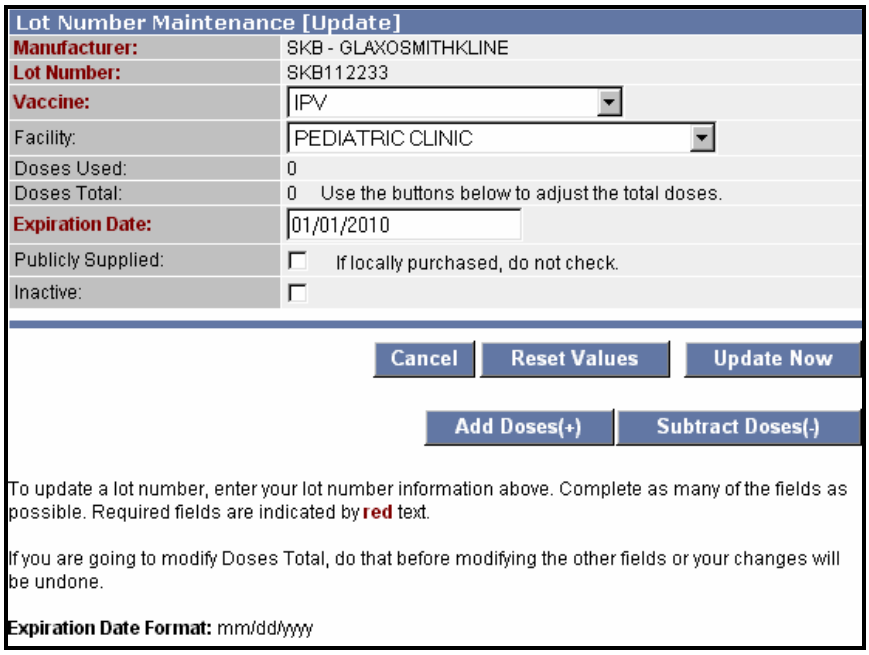
From here, you can choose to edit the existing record by clicking on "Edit Lot Number", or you can view the activity for that lot number by clicking on "View Lot Log".



By clicking on the "Edit Lot Number" button, you will be able to edit the existing information in that record. Before entering edit mode, you will receive a warning message explaining that the record will be locked from other users. Once records are entered and saved, they cannot be deleted, only inactivated.

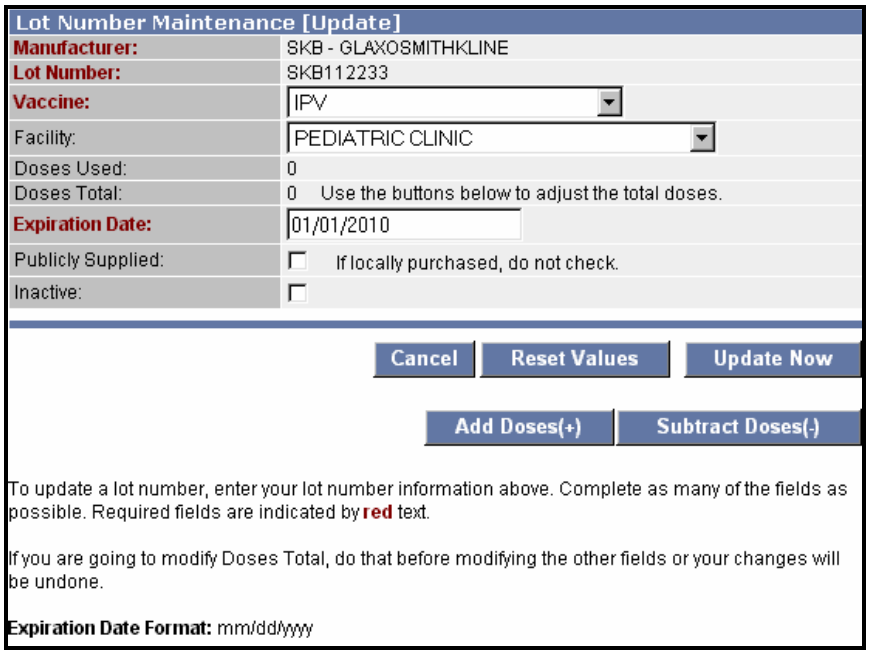
After clicking the "OK" button, you will only be able to edit the vaccine type, the facility, the expiration date, whether or not it is VFC supplied, or whether or not the lot number is inactive.

At any time, you can cancel the edit by clicking on the "Cancel" button, or you can undo the changes by clicking on the "Reset Values" button. The "Cancel" button will bring you back to the Lot Number Search screen. The "Reset Values" button will reset the current screen to its original values. If you click the "Update Now" button, the application will save your changes and bring you back to the "Lot Number Search" screen.



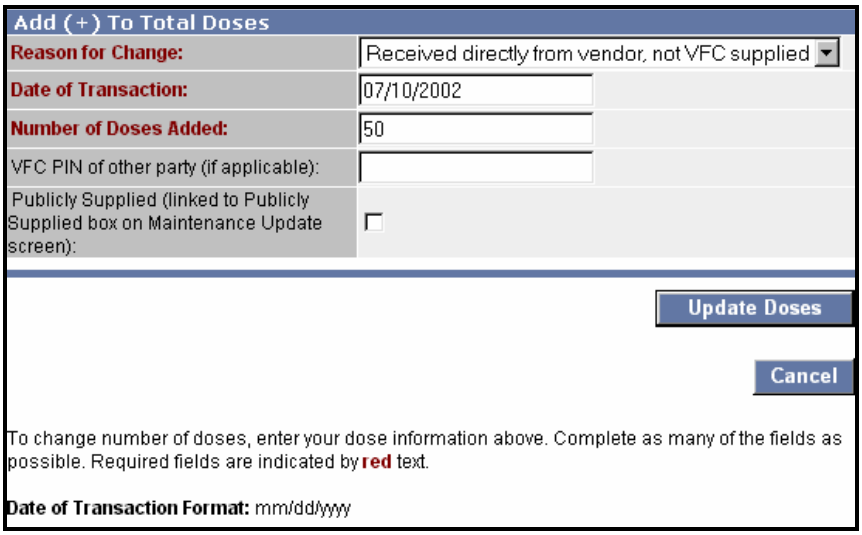
2.4.3 Adjusting Doses

Doses of vaccine cannot be added or subtracted until the lot number is saved in the web application. If you are going to modify Doses Total, do that before modifying the other fields or your changes will be undone. In order to see changes made for a specific vaccine, select the lot number and click on the "View Lot Log" button from the Lot Number Maintenance screen.

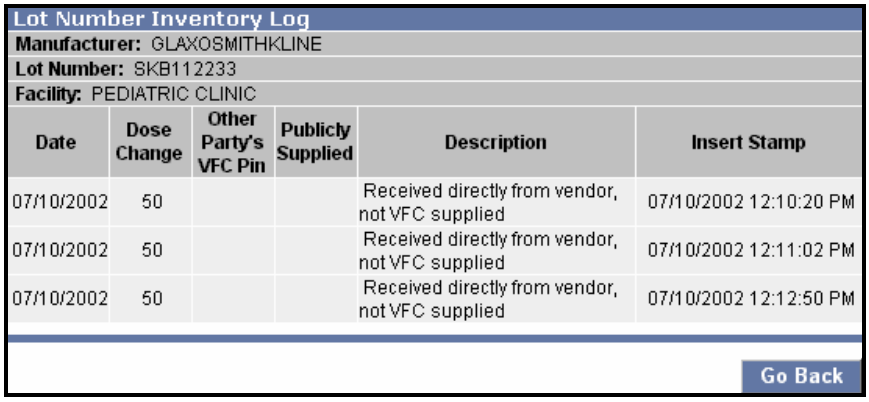


To add doses to a specific vaccine lot number, click the "Add Doses (+)" button. The fields labeled in red require an entry. Fill in as much of the other information as possible. Once the form has been completed, click the "Update Doses" button, or click "Cancel" to return to the Lot Number Update screen without saving changes.

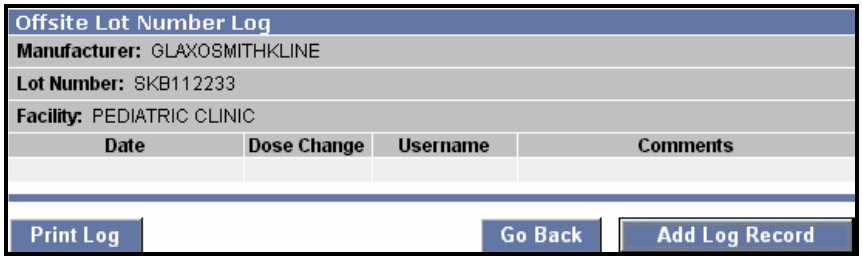
To subtract doses from a specific vaccine, click the "Subtract Doses (-)" button. The fields labeled in red require an entry. Complete as much of the other information as possible. Once the form has been completed, click the "Update Doses" button, or click "Cancel" to return to the Lot Number Update screen without saving changes.



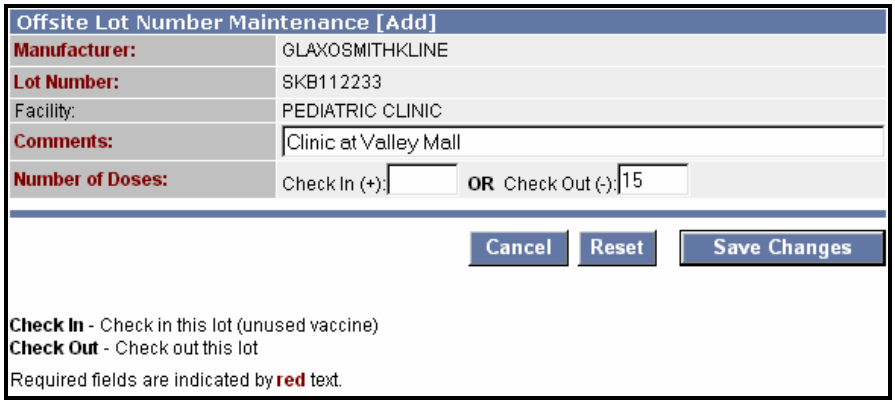
To verify that the changes occurred, click on the "View Lot Log" button. From this screen, you should see your current changes to the doses.



If you are running a remote clinic, click the "View Offsite Log" button. From the "Offsite Lot Number Log" window, the use can choose to print the log, add a log record, or go back to the previous screen.

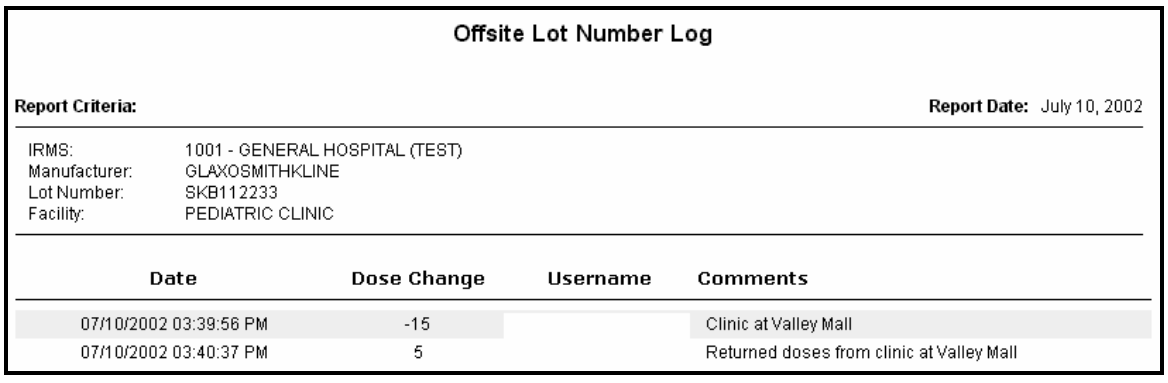


To add information to the Offsite Log, click on the "Add Log Record" button. Next, place the cursor in the comments section to explain the addition or subtraction of doses. Enter the amount of doses in either one of the "Check In (+)" or "Check Out (-)" boxes. The application will not accept an entry in both fields. Once finished entering the appropriate information, click the "Save Changes" button.



The "Print Log" button will create a report in a new window. From there, the user can use the browser print options to print a paper copy of this record.

Clicking the "Cancel" button will close the page and return you to the Lot Log Page.



3 Settings Menu

3.1 About Settings

Settings allow users to select default values to be used to expedite data entry. Several key values can be entered into "Personal Settings" that will be used as the default for future record entry. Default values can be used for patient, vaccination, anatomical site, lot number, and VIS publication date information.

Default information is entered automatically when adding patient records or vaccinations. It is specifically set up for the user that is logged into the web application. It is important to set up the toolbox before personal settings because the personal settings feature relies on some of the toolbox information.

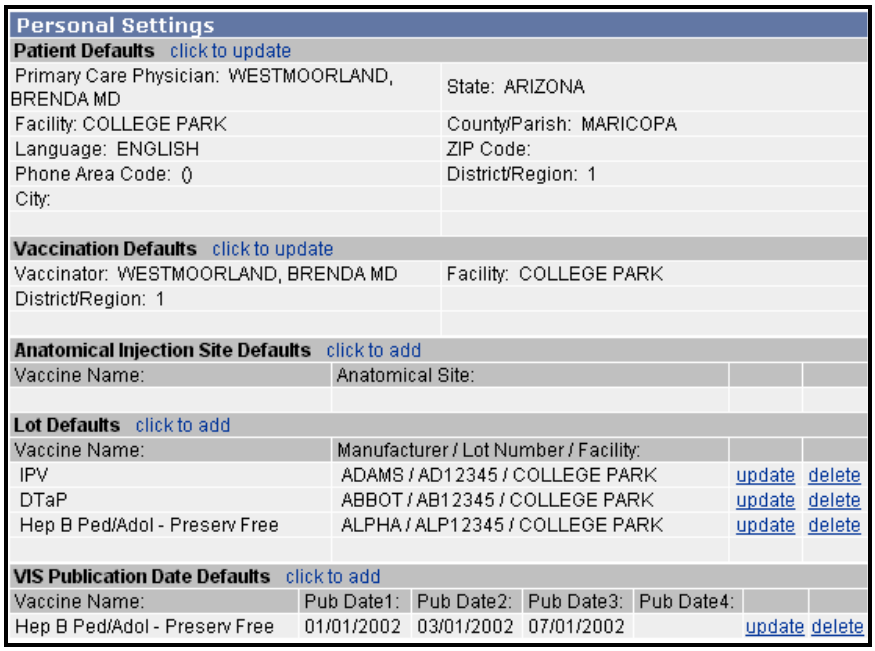
The Personal Settings feature is used in two different ways:

- When adding a new patient into the database through the web application, the patient defaults will automatically be entered into some of the fields in the patient demographic record.
- When adding new vaccinations for a patient, the Vaccination Defaults, Anatomical Injection Site Defaults, Lot Defaults, and VIS Publication Date Defaults will automatically be used to fill out some of the fields in the patient vaccination record.

Note: *If the user has "Client" user rights, the facility field will automatically be populated in the Personal Settings menu.*

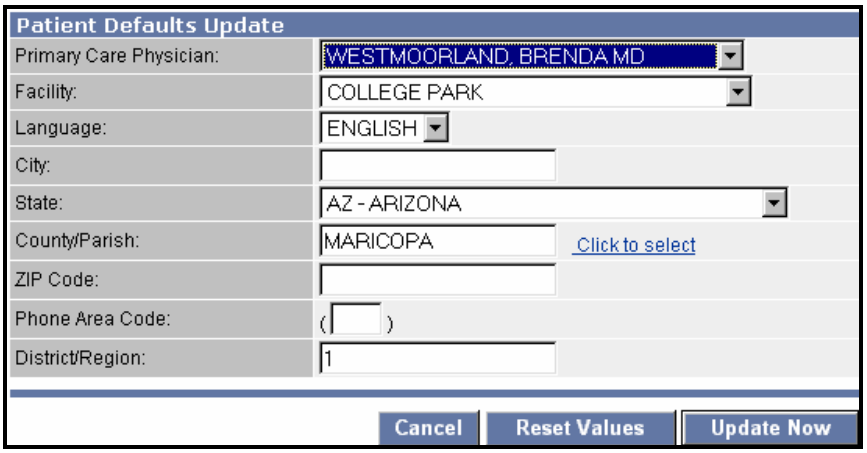
3.2 Settings Menu - Personal

In the "Personal Settings" screen, click on the "click to update" or "click to add" hyperlink, next to the heading. This will put the selected box into add/edit mode. From here, you can customize any of the information in that section. Make selections using the drop down menus or type in the information.

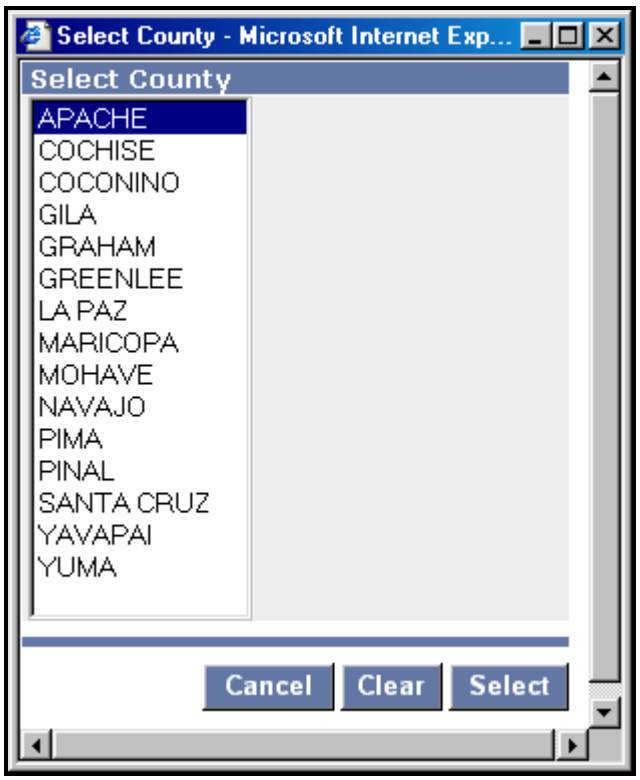


When in edit mode in the "Patient Defaults" section, complete as much information as possible. A State must be selected before adding County/Parish to personal settings. The State selected will be used as a default in Birth State and Birth Country whenever adding a new patient to the IWeb2000 application.

To add the County or Parish, click the "Click to select" hyperlink located next to the County/Parish box.



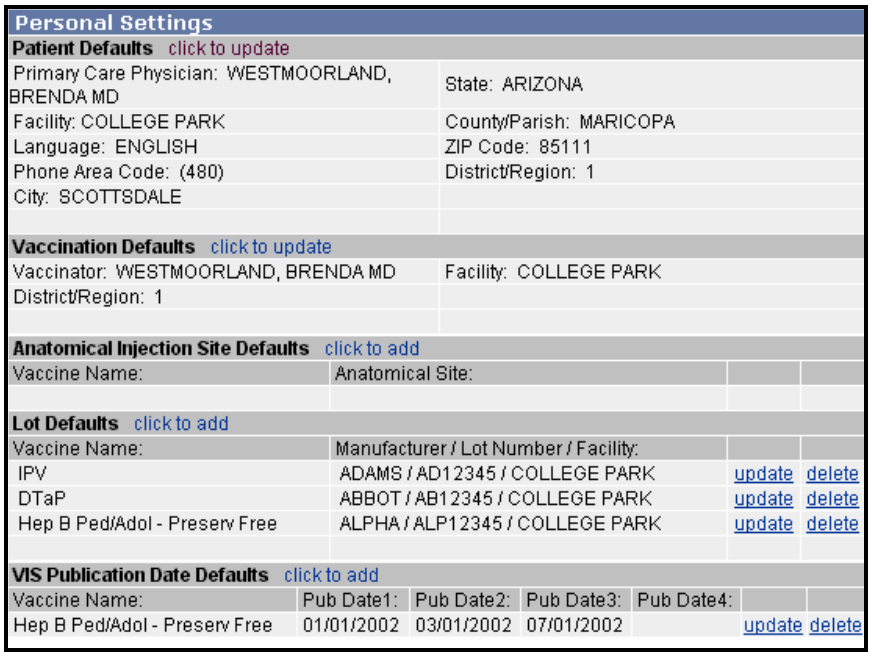
This will return a list of Counties or Parishes for the particular State you have selected. The same applies when you are in edit mode for Lot Defaults. Click on the "Click to select" hyperlink, and it will bring back a list with all the vaccine manufacturers.



If you have made an error, click on the "Reset Values" button or put the cursor in the field and click the "back" button on your keypad. If this is your first time using "Personal Settings", this button will clear the fields. If you are editing information, this will return the historical values to the boxes.

At any time, you can click on the "Cancel" button to exit out of edit mode. When you are finished adding or updating values, click on the "Update Now" button. This will return you to the "Personal Settings" main screen.

Anatomical Injection Site Defaults and Lot Defaults refer to more than one vaccine. Because of this, to add a vaccine to either list, you must click on the "click to add" hyperlink. To edit the vaccines list, you must click on the "update" hyperlink, located to the right of the vaccine you wish to edit. To remove a vaccine from either list, click the "delete" hyperlink.



Personal Settings

Patient Defaults click to update

Primary Care Physician: WESTMOORLAND, BRENDA MD	State: ARIZONA
Facility: COLLEGE PARK	County/Parish: MARICOPA
Language: ENGLISH	ZIP Code: 85111
Phone Area Code: (480)	District/Region: 1
City: SCOTTSDALE	

Vaccination Defaults click to update

Vaccinator: WESTMOORLAND, BRENDA MD	Facility: COLLEGE PARK
District/Region: 1	

Anatomical Injection Site Defaults click to add

Vaccine Name:	Anatomical Site:		

Lot Defaults click to add

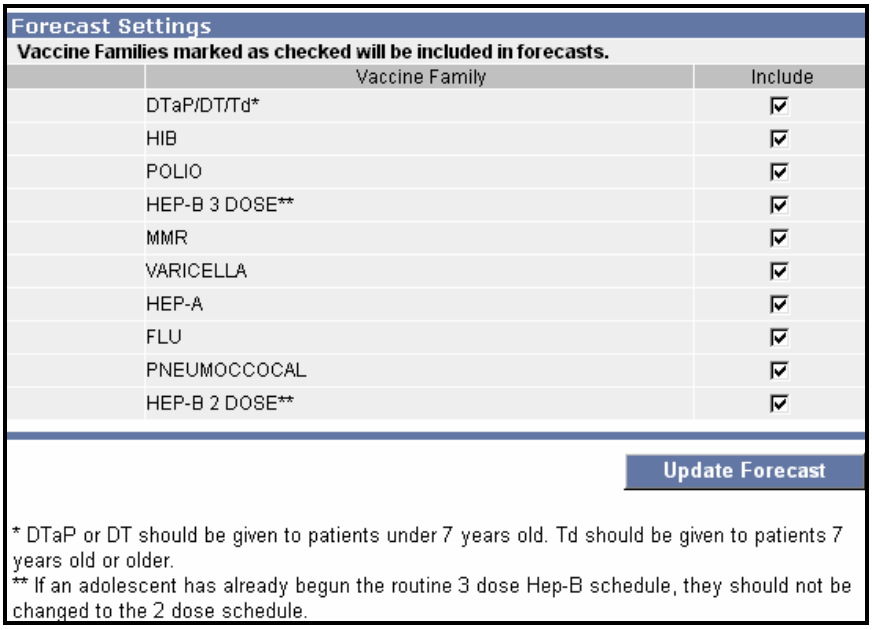
Vaccine Name:	Manufacturer / Lot Number / Facility:		
IPV	ADAMS / AD12345 / COLLEGE PARK	update	delete
DTaP	ABBOT / AB12345 / COLLEGE PARK	update	delete
Hep B Ped/Adol - Preserv Free	ALPHA / ALP12345 / COLLEGE PARK	update	delete

VIS Publication Date Defaults click to add

Vaccine Name:	Pub Date1:	Pub Date2:	Pub Date3:	Pub Date4:		
Hep B Ped/Adol - Preserv Free	01/01/2002	03/01/2002	07/01/2002		update	delete

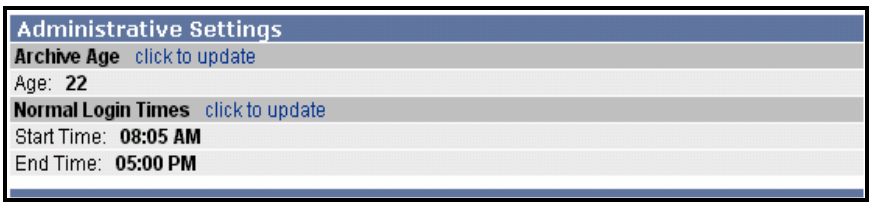
3.3 Settings Menu - Forecast

Forecasting enables users to view the shots that will be due based on available patient information. You can view a listing of needed shots along with due dates for each patient. Before you use the Forecast feature, be sure to select the Vaccine Families you wish to forecast or unselect the Vaccine Families you do not wish to forecast. Once you are finished, click on the "Update Forecast" button.



3.4 Administrative Settings

The Administrative Settings are to be used by Administrators of the State Information Immunization System. The permission settings are in the PCI Administrator module, under Web User Maintenance. Follow the instructions below to use the Administrator Settings



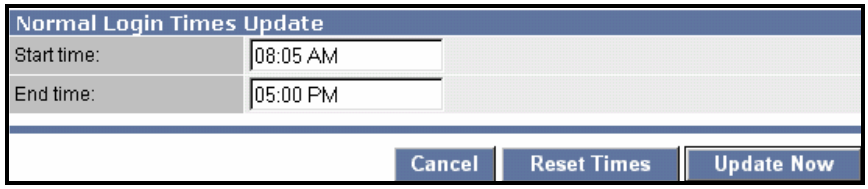
3.4.1 Archive Age

Archive Age is a program that allows a SIIS Registry Administrator to archive patients over a certain age. For example, if your state legislation states that the only patients to be tracked within the application are children under 3 years of age, the SIIS Registry Administrator would enter the age of "4". Every thing below 4 would no longer be available to users of the SIIS web application. To use, follow these steps:

1. Enter the age of patients into the box to archive for that age and over.
2. To un-archive all records, enter "-1". This will remove all records from archive.
3. To turn off the archiving feature, enter "0". This will stop the archiving process and will leave any records previously archived alone.
4. To un-archive one record, users must open the patient record in PCI2000 and uncheck the "Archived" checkbox.
5. When finished entering the proper setting, click the "Update Now" button.
6. To cancel or reset to the previously saved settings, click the appropriate buttons.

3.4.2 Normal Login Times

Normal Login Times is a program the assists the administrators of the web application to monitor security. By setting a Start and End time, the application will track any usage outside of the time range the administrator enters.



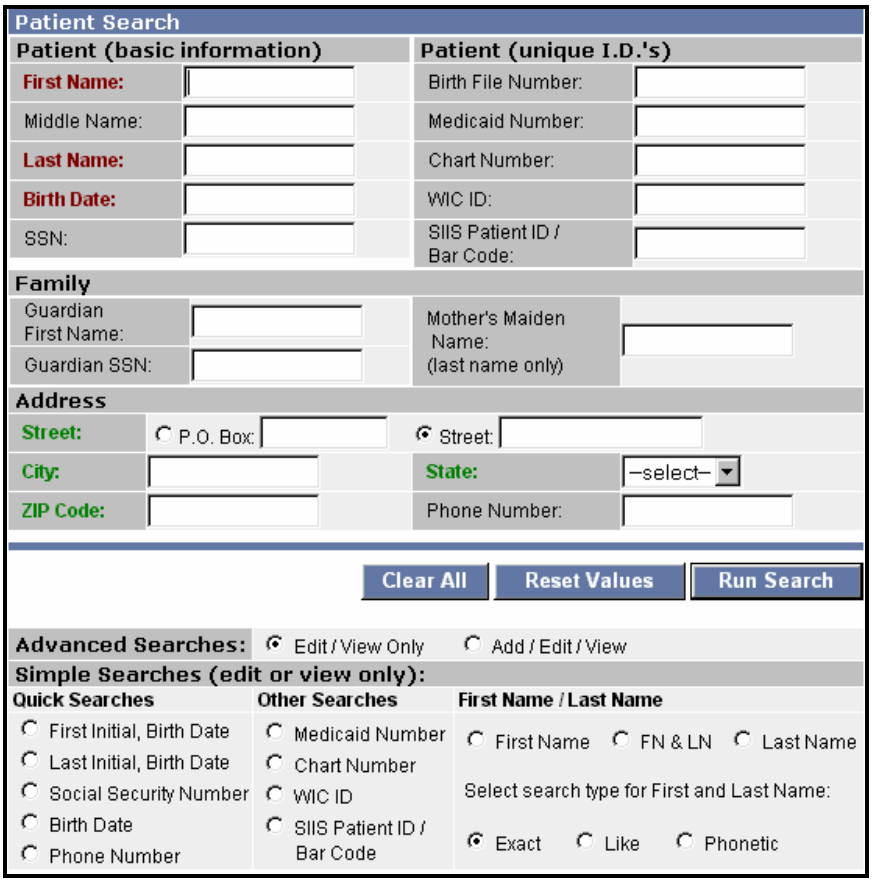
4 Patient Menu

4.1 Patient Menu - Search/Add

In this screen, you will see patient basic information entry spaces. Some of the spaces are labeled in red, some are labeled in green, and the rest are labeled in black. The spaces labeled in red are required entries for patient search – "Edit/View Only". This section contains first name, last name, and birth date.

The spaces labeled in green and red are required entries for patient search – "Add/Edit/View". This section contains fields to enter the patient's address.

Note: *The reason more information is required for patient "Add…" is to help eliminate the duplication of patient records in the central registry.*



4.1.1 Patient (basic information)

This area contains the fields to enter the patient's first name, last name, and date of birth. You can enter the patient's middle name here as well, but it is not a required field. Required entry fields for adding or editing information are in red.

4.1.2 Patient (unique I.D.'s)

This area contains fields to enter the patient's Social Security, Medicaid, birth file, and chart numbers. These information entries for a particular patient should never match any other patient's information. Although, sometimes the guardian's SSN is used for everyone in a household.

4.1.3 Family

This area contains fields to enter the patient's Guardian Name, Social Security Number, and Mother's Maiden Name. When adding a new patient to the database, one of these fields is required to have information in it to help protect against duplicates.

4.1.4 Address

This area contains fields to enter the patient's physical address or P.O. Box information. When adding a new patient to the database, either the physical address or P.O. Box address must be complete. The phone number is required as well. Required entry fields for adding new information are in green and red.

4.1.5 Searches

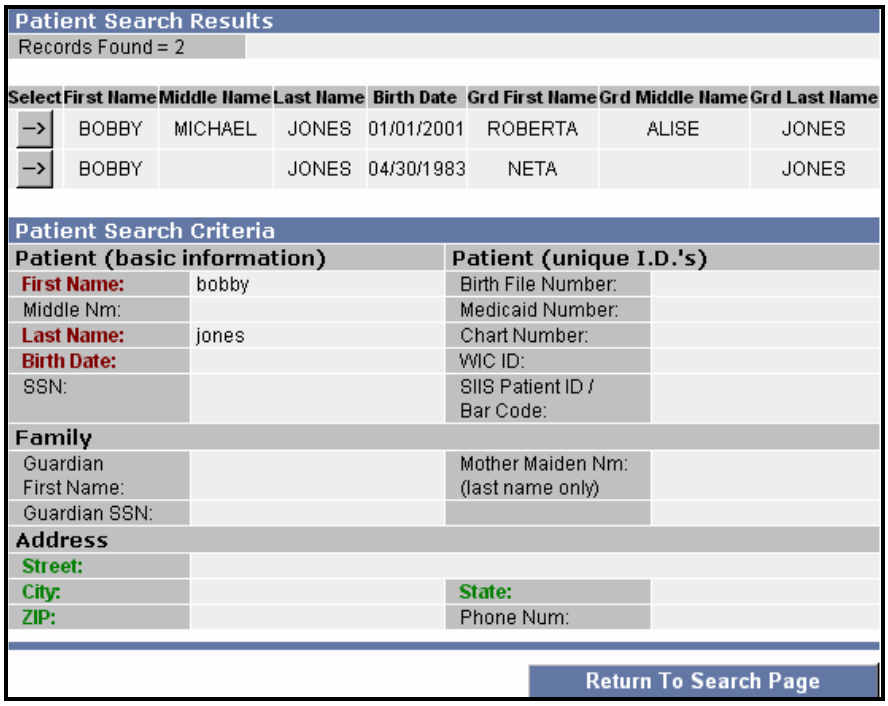
There are two areas to use when searching for a patient in the web application. They are Advanced Searches (add, edit, or view) and Simple Searches (edit or view only).

4.1.5.1 Simple Searches - Edit or View Patient Data

Simple Searches are used to edit or view existing patient information. When conducting a simple search, the user is not required to enter information for all of the fields shown in red. Searches can be completed with limited information, including searches by:: First Initial and Birthday, Last Initial and Birthday, Social Security Number, Birth Date only, Phone Number, First Name, First and Last Name, Last Name, Medicaid Number, and Chart Number.

Existing patient information can be updated or viewed by entering the correct information in the spaces labeled in red or by performing a simple search. Once you have completed entering the required information, click on the "Edit/View Only" radio button, or make a selection from the quick searches area. Once the proper selections are made and the proper information is entered, click the "Run Search" button. A "Search Results" screen appears with all the possible matches.

If there are multiple records matching your search fields, look at the family information to find the record that most closely resembles your search. Once you have made your selection, click on the arrow button next to the name to view the record.



Patient Search Results

Records Found = 2

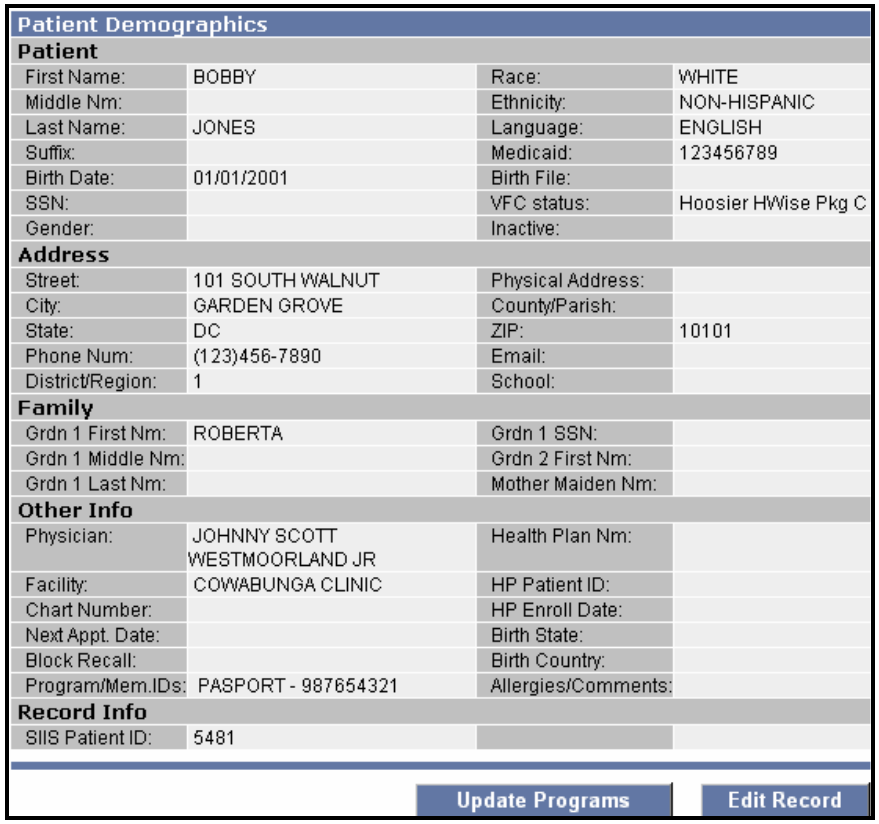
Select	First Name	Middle Name	Last Name	Birth Date	Grd First Name	Grd Middle Name	Grd Last Name
→	BOBBY	MICHAEL	JONES	01/01/2001	ROBERTA	ALISE	JONES
→	BOBBY		JONES	04/30/1983	NETA		JONES

Patient Search Criteria

Patient (basic information)		Patient (unique I.D.'s)	
First Name:	bobby	Birth File Number:	
Middle Nm:		Medicaid Number:	
Last Name:	jones	Chart Number:	
Birth Date:		WIC ID:	
SSN:		SIIS Patient ID / Bar Code:	
Family			
Guardian First Name:		Mother Maiden Nm: (last name only)	
Guardian SSN:			
Address			
Street:			
City:		State:	
ZIP:		Phone Num:	

Return To Search Page

Located at the bottom of this screen are two buttons, "Update Programs" and "Edit Record". The "Update Programs" button is used to add special programs the record for which the patient participates. Examples of special programs include WIC, KIDSHOTS, and KIDVACCS. The "Edit Record" button will put the record in edit mode. From edit mode, you may change or add any information.



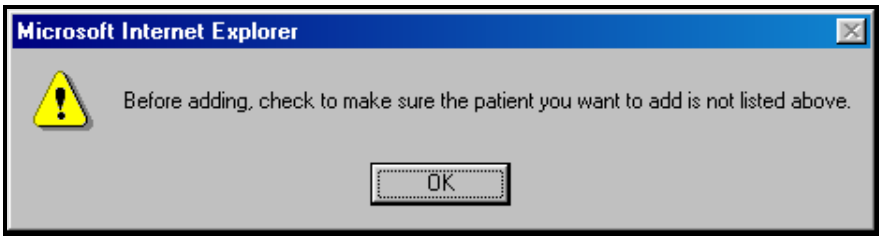
Patient Demographics

Patient			
First Name:	BOBBY	Race:	WHITE
Middle Nm:		Ethnicity:	NON-HISPANIC
Last Name:	JONES	Language:	ENGLISH
Suffix:		Medicaid:	123456789
Birth Date:	01/01/2001	Birth File:	
SSN:		VFC status:	Hoosier HWise Pkg C
Gender:		Inactive:	
Address			
Street:	101 SOUTH WALNUT	Physical Address:	
City:	GARDEN GROVE	County/Parish:	
State:	DC	ZIP:	10101
Phone Num:	(123)456-7890	Email:	
District/Region:	1	School:	
Family			
Grdn 1 First Nm:	ROBERTA	Grdn 1 SSN:	
Grdn 1 Middle Nm:		Grdn 2 First Nm:	
Grdn 1 Last Nm:		Mother Maiden Nm:	
Other Info			
Physician:	JOHNNY SCOTT WESTMOORLAND JR	Health Plan Nm:	
Facility:	COWABUNGA CLINIC	HP Patient ID:	
Chart Number:		HP Enroll Date:	
Next Appt. Date:		Birth State:	
Block Recall:		Birth Country:	
Program/Mem.IDs:	PASPORT - 987654321	Allergies/Comments:	
Record Info			
SIIS Patient ID:	5481		

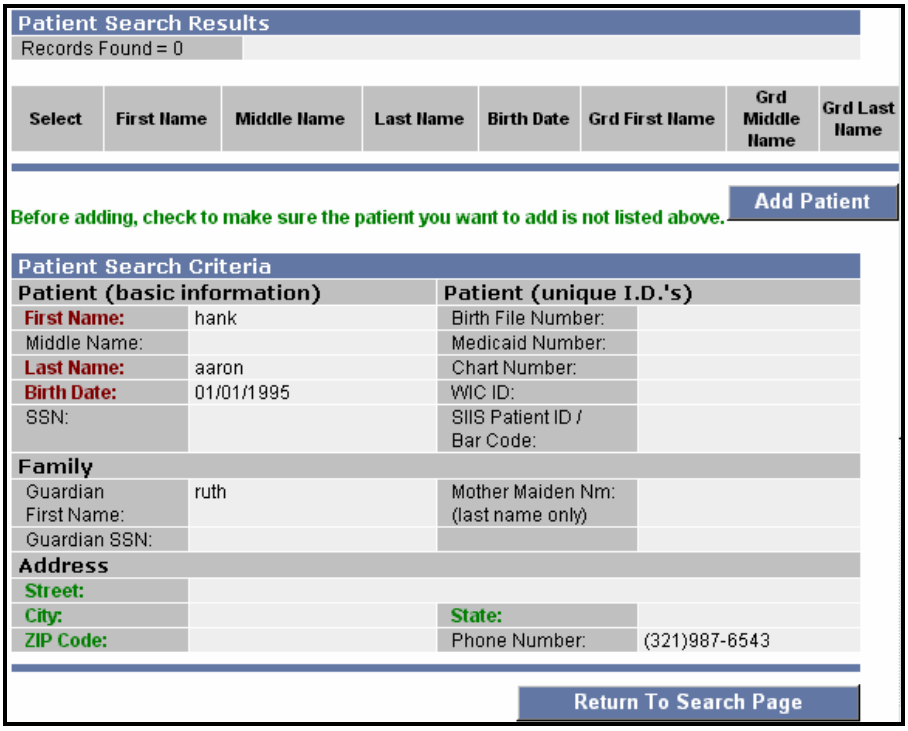
Update Programs | Edit Record

4.1.5.2 Advanced Searches - Add, Edit, or View Patient Data

Advanced Searches are used to add, edit or view existing patient information. This search requires entry in the Patient (basic information) red fields, one entry in the Family area, one entry in the address area. A new patient record can be added by entering the correct information in the required red and green fields. Once you have completed entering the required information, click on the "Add/Edit/View" radio button and click the "Run Search" button. The following message will appear. Click "OK" to continue to add a patient.



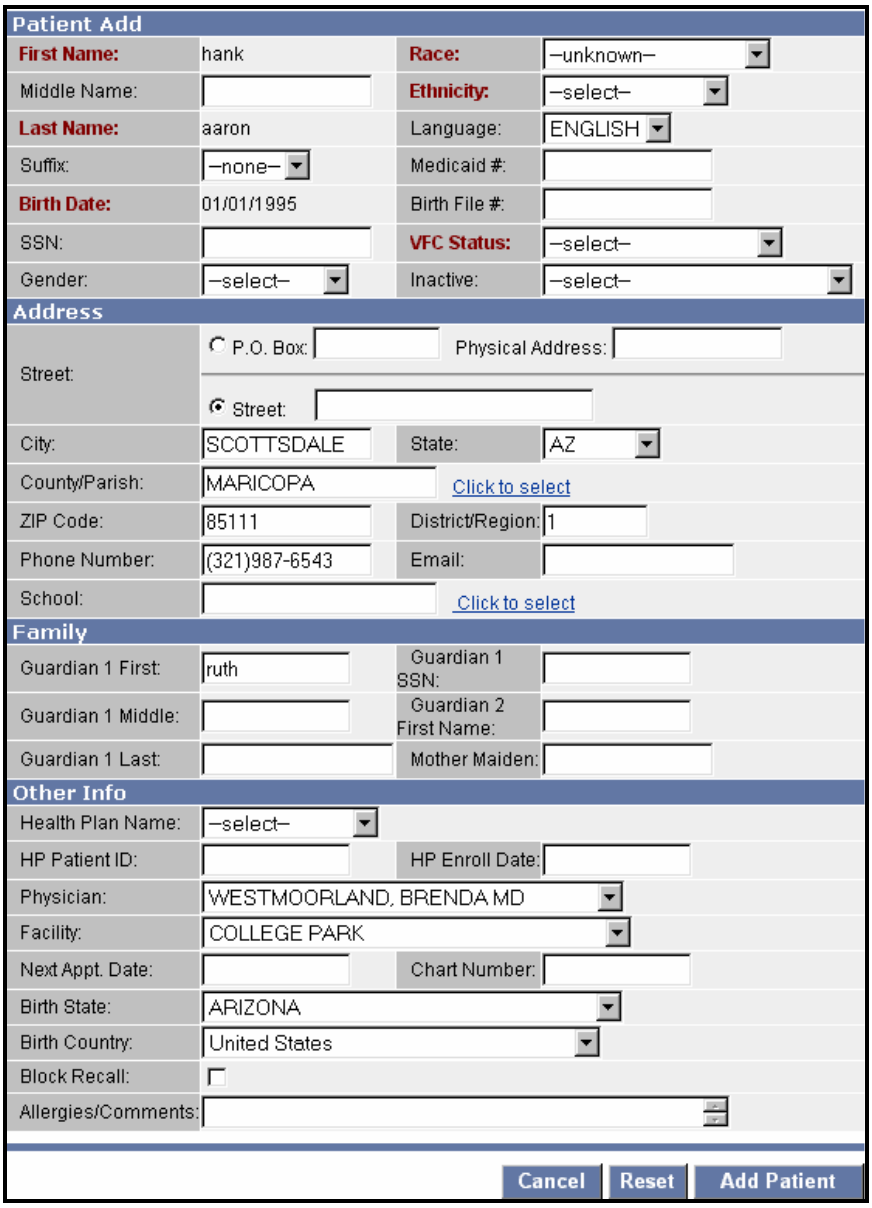
A " Patient Search Results" screen will appear with all the possible matches. The application searches for possible matches in the database and asks you to check the possible matches to reduce duplication.



Once you are sure the record is not a duplicate, click the "Add Patient" button. Continue to fill out the rest of the blank information fields. Remember to fill in the fields labeled with red. They are required when adding a patient.

It is important to enter as much information as possible. Click "Add Patient" when you have completed filling out the information on that page. The fields labeled in red are required fields.

When choosing "Medicaid" as the VFC status, the Medicaid # field will also turn red, meaning that an entry is required.



4.1.6 Searching by Bar Code

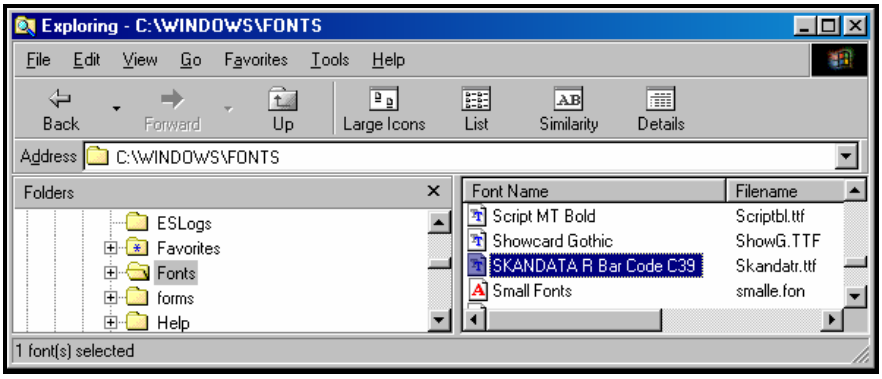
The bar code scanner is a simple solution to searching for a patient record that already exists in the central registry. All that is needed from the patient is a document of some sort with a patient ID bar code printed on it. The document can be an existing Patient Record Report, an Immunization Record Card, or even a Reminder/Recall Post Card.

4.1.6.1 Setting up the Scanner

The scanner is designed to work with most IBM-compatible computers with PS/2 ports, and Windows operating systems. There are a few items needed before getting started:

- Check the pc for the Bar Code font needed for scanning. If the Bar Code font is not present, check with the system administrator to obtain it.
- There should be two components of the bar code scanner:
  - The "Y" splitter cable
  - The Wedge scanner

Step 1: Ensure the Bar Code scanner font is installed on the computer where the scanner is to be attached. The fonts folder is usually located in the "Windows" or "WINNT" folder. For example, (C:\WINDOWS\Fonts)



Step 2: Turn off the computer.

Step 3: Attach the scanner using a "Y" splitter cable. A "Y" cable should be provided with the scanner for installation. It is called a "Y" splitter because it has three ends. One end attaches to the pc, one to the scanner and one to the keyboard. If the splitter cable does not come with the scanner, check with the system administrator to obtain it.

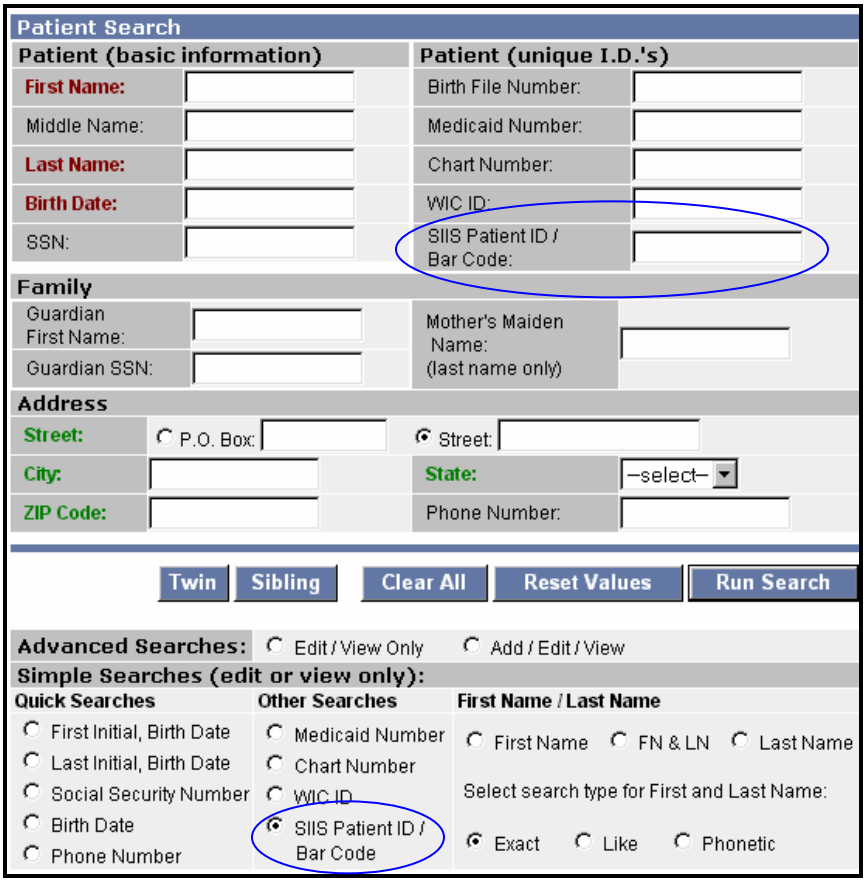
Step 4: Turn on the computer. The scanner should now be ready to use.

4.1.6.2 Using the Scanner

The following steps will explain how to perform a patient search.

Step 1: After logging into the application, click on the Search/Add hyperlink, located in the Patient menu.

Step 2: Use the mouse, or the "Tab" key, to place the cursor in the data entry box labeled "SIIS Patient ID/ Bar Code". This will automatically switch the search options to "SIIS Patient ID/ Bar Code", located at the bottom of the screen.



Step 3: While pressing the button on the bottom of the scanner, scan the patient's bar code. To scan the bar code, follow the these instructions:

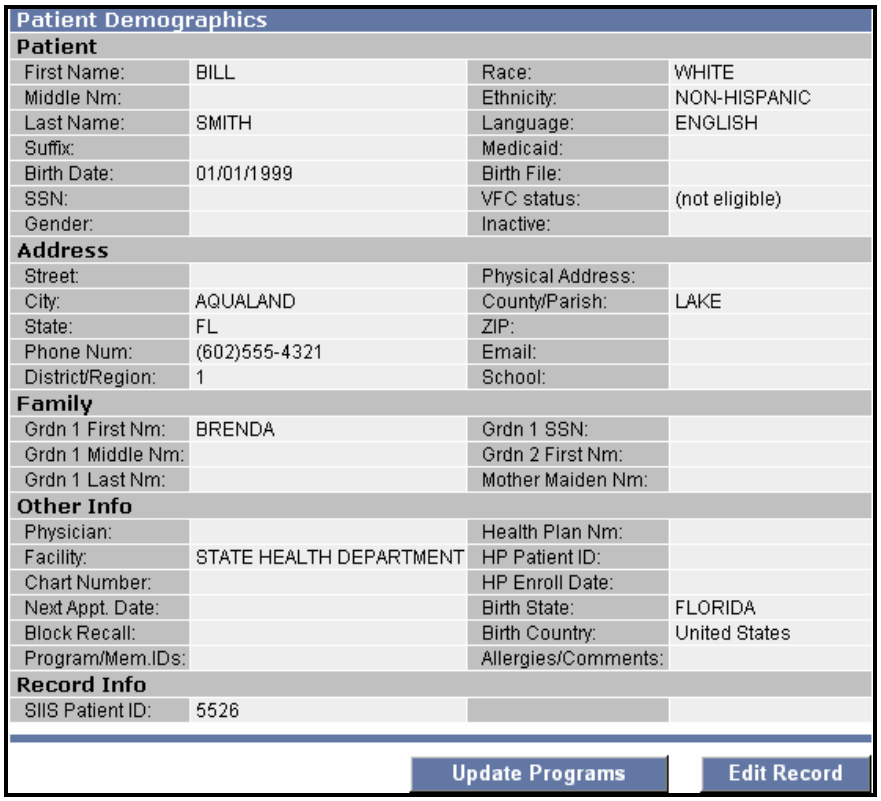
- Approach, point, or touch the bar code label with the window of the scanner.
- Center the scanner on the bar code for a faster read.
- Scan with a distance of 0" to 1".
- The scanner will "beep" or display a green LED with a good scan.

After the bar code is scanned, the application will automatically perform z search for the patient record and will return with that patient's record in a patient demographic page, not the patient search result page. If there is no patient match, the search result page will be displayed with "No Match" message.

Step 4: Select the patient from the results screen.

4.1.7 Programs

A screen will appear that shows all the demographic information for that patient. At the bottom of this screen are two buttons, "Update Programs" and "Edit Record". The "Update Programs" button is used to add special programs to the patient's record. An example of a special program is WIC. The "Edit Record" button will put the record in edit mode. From edit mode, you may change or add any information.

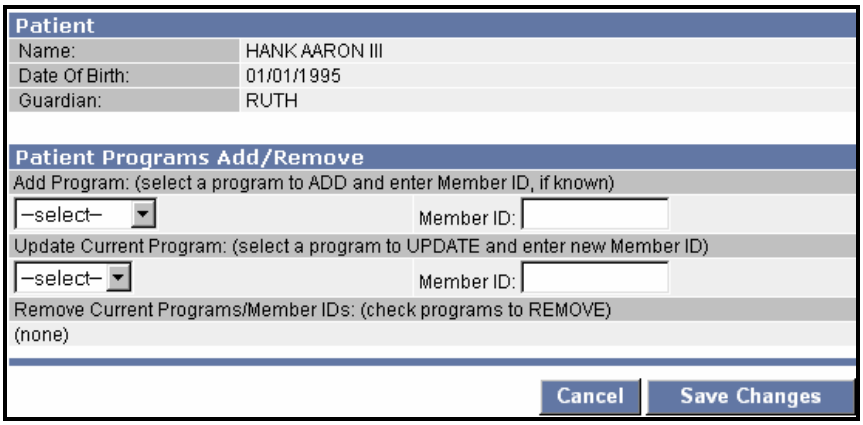


Patient Demographics

Patient			
First Name:	BILL	Race:	WHITE
Middle Nm:		Ethnicity:	NON-HISPANIC
Last Name:	SMITH	Language:	ENGLISH
Suffix:		Medicaid:	
Birth Date:	01/01/1999	Birth File:	
SSN:		VFC status:	(not eligible)
Gender:		Inactive:	
Address			
Street:		Physical Address:	
City:	AQUALAND	County/Parish:	LAKE
State:	FL	ZIP:	
Phone Num:	(602)555-4321	Email:	
District/Region:	1	School:	
Family			
Grdn 1 First Nm:	BRENDA	Grdn 1 SSN:	
Grdn 1 Middle Nm:		Grdn 2 First Nm:	
Grdn 1 Last Nm:		Mother Maiden Nm:	
Other Info			
Physician:		Health Plan Nm:	
Facility:	STATE HEALTH DEPARTMENT	HP Patient ID:	
Chart Number:		HP Enroll Date:	
Next Appt. Date:		Birth State:	FLORIDA
Block Recall:		Birth Country:	United States
Program/Mem.IDs:		Allergies/Comments:	
Record Info			
SIIS Patient ID:	5526		

Update Programs | Edit Record

When you click on the "Update Programs" button, you will be taken to a " Patient Programs Add/Remove" screen as shown below. This screen allows you to select programs that are available in your state. Click on the drop down menu and choose from the list. Next, enter in the member ID for that particular program. You also have the option of editing program and ID information or deleting the program from the patient information. When you are finished, click the "Save Changes" button, or click "Cancel" to return to the "Patient Demographics" screen.



Note: *If you update a member ID and remove the program at the same time, the program will be removed.*

4.1.8 Other Buttons

The "Twin" and "Sibling" buttons are used to simplify data entry when adding or editing patient records from the same family or address. When the "Twin" button is clicked, it automatically enters the same last name, date of birth, family information, and address information. When the sibling button is clicked, it does the same as the "Twin" button, except it does not enter a date of birth.

The "Cancel" button is used to cancel the entire entry of information for the particular patient. When you click the button, it will take you back to the search results screen. The "Reset Values" button is used for starting over on that same page. When you click on the "Reset Values" button, it clears all the information in the fields that were recently entered.

4.2 Patient Menu – Search Results

Once you have done a search for a patient's record, click on the "Search Results" hyperlink to return to the "Search Results" screen. This is useful when you were looking at one patient's record and you want to look at the next one rather than clicking the "Back" button in the web browser.

4.3 Patient Menu – Demographics

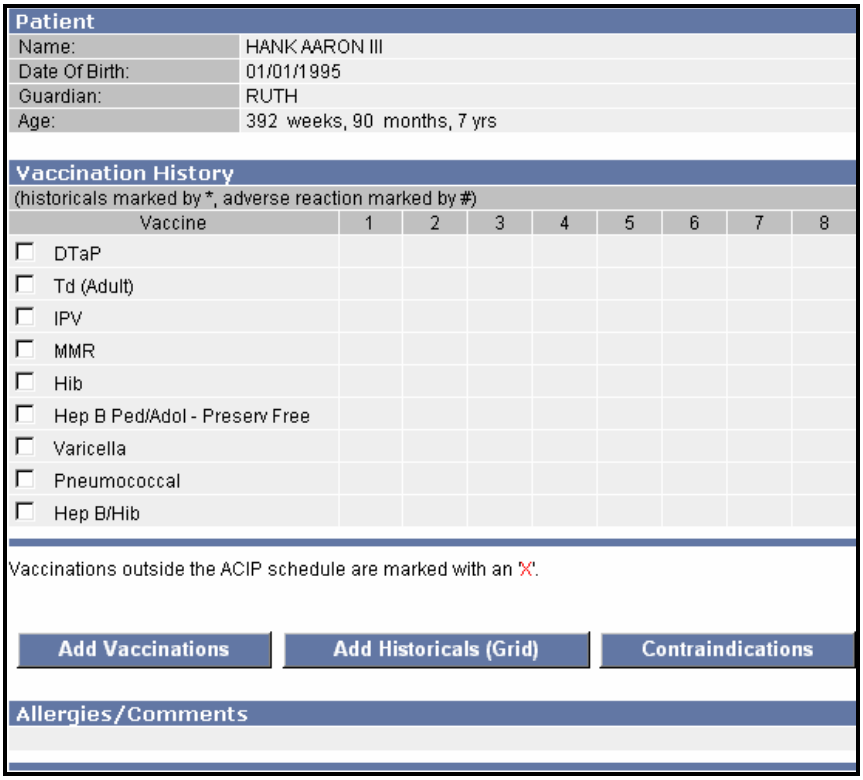
The "Demographics" menu item is useful for going back to the most recent patient record you were looking at or working in.

5 Vaccination Menu

5.1 Vaccinations Menu - History

This section describes the procedures for entering patient immunization information. The vaccination history screen shows a complete list of vaccinations recorded for a particular patient. You can view the type of vaccination and the date given, determine if it was historical, if the patient had an adverse reaction to the vaccine, and conduct a forecast for needed vaccinations.

Once a patient's record has been retrieved as described in Section 4, click on the history link on the left side of the screen to bring up the patient's immunization record.



Note: *It is important to know that only the users at the facility where the shot was administered can edit an "Administered" shot. If you need to see the detail of one vaccine, you can click on the date. The date of the vaccination is hyperlinked and will take you to the record.*

5.1.1 Administered Shot Date

In the Vaccinations Record, if a shot is administered, it is shown with the date minus an asterisk.

5.1.2 Historical (Non-Administered) Shot Date

A date followed by an asterisk indicates a non-administered or historical shot.

5.1.3 Adverse Reaction

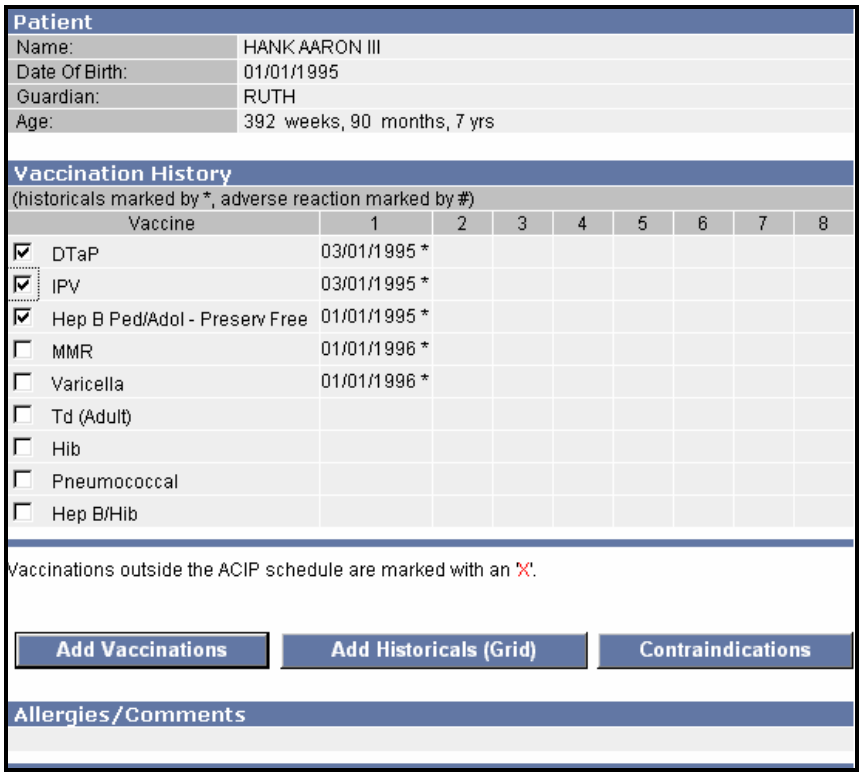
If a patient has an adverse reaction to an administered shot, there will be a number symbol next to the date.

5.1.4 Invalid Vaccination

A date preceded by a red "X" indicates that the vaccination in a particular series was not administered according to recommendations by the ACIP.

5.1.5 Adding Common Vaccinations

You have the capability to add additional vaccines in a series, which are listed. Click in the check box located next to the vaccine name. Next, click on the "Add Vaccinations" button to enter administered doses and the web application will bring up the information entry screen.



Patient

Name:	HANK AARON III
Date Of Birth:	01/01/1995
Guardian:	RUTH
Age:	392 weeks, 90 months, 7 yrs

Vaccination History

(historicals marked by *, adverse reaction marked by #)

Vaccine	1	2	3	4	5	6	7	8
☑ DTaP	03/01/1995 *							
☑ IPV	03/01/1995 *							
☑ Hep B Ped/Adol - Preserv Free	01/01/1995 *							
☐ MMR	01/01/1996 *							
☐ Varicella	01/01/1996 *							
☐ Td (Adult)								
☐ Hib								
☐ Pneumococcal								
☐ Hep B/Hib								

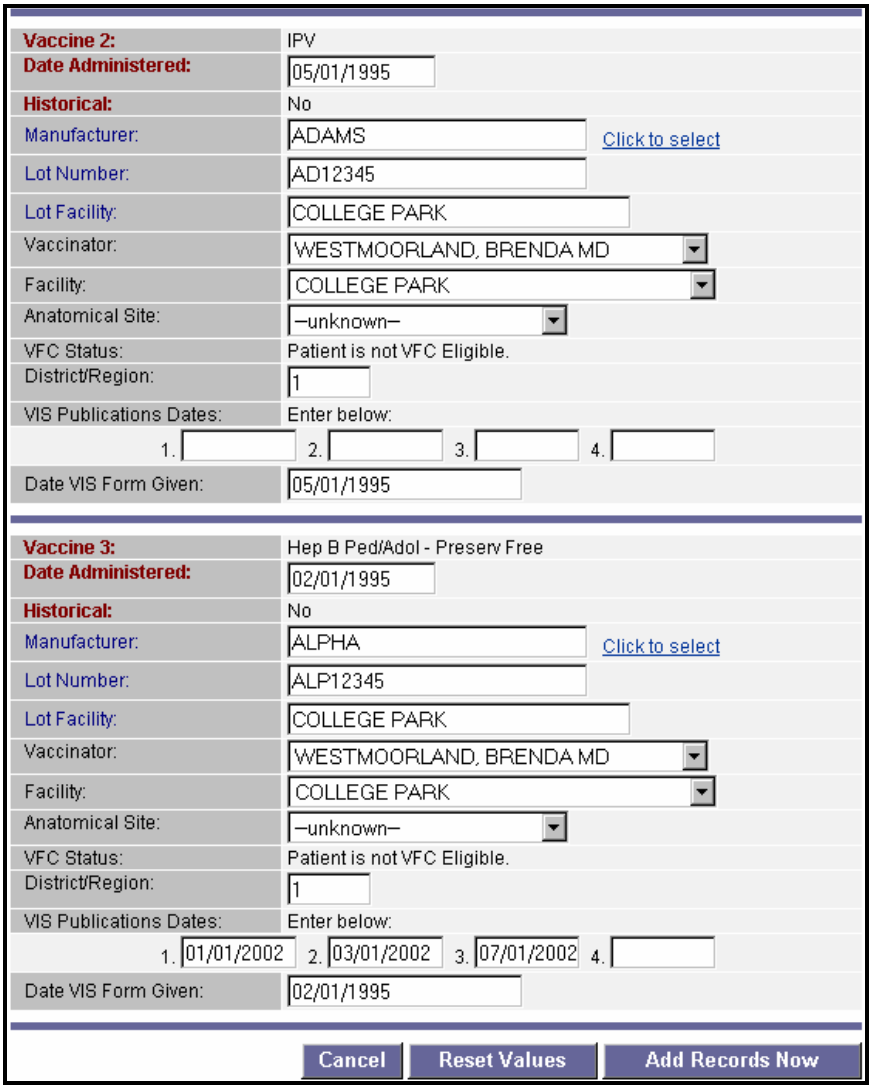
Vaccinations outside the ACIP schedule are marked with an 'X'.

Add Vaccinations | Add Historicals (Grid) | Contraindications

Allergies/Comments

From here, check all the information and make any changes, if necessary. The system will automatically enter today's date as the date of administration. If you need to enter a historical date, simply type the date into the box provided. This date will remain in effect until the user changes it, or the session has ended. Additionally, it will change the dates in the rest of the date fields.

After you complete entering that information, click on "Add Records Now" to proceed forward, or "Cancel" to return to the vaccination history screen.

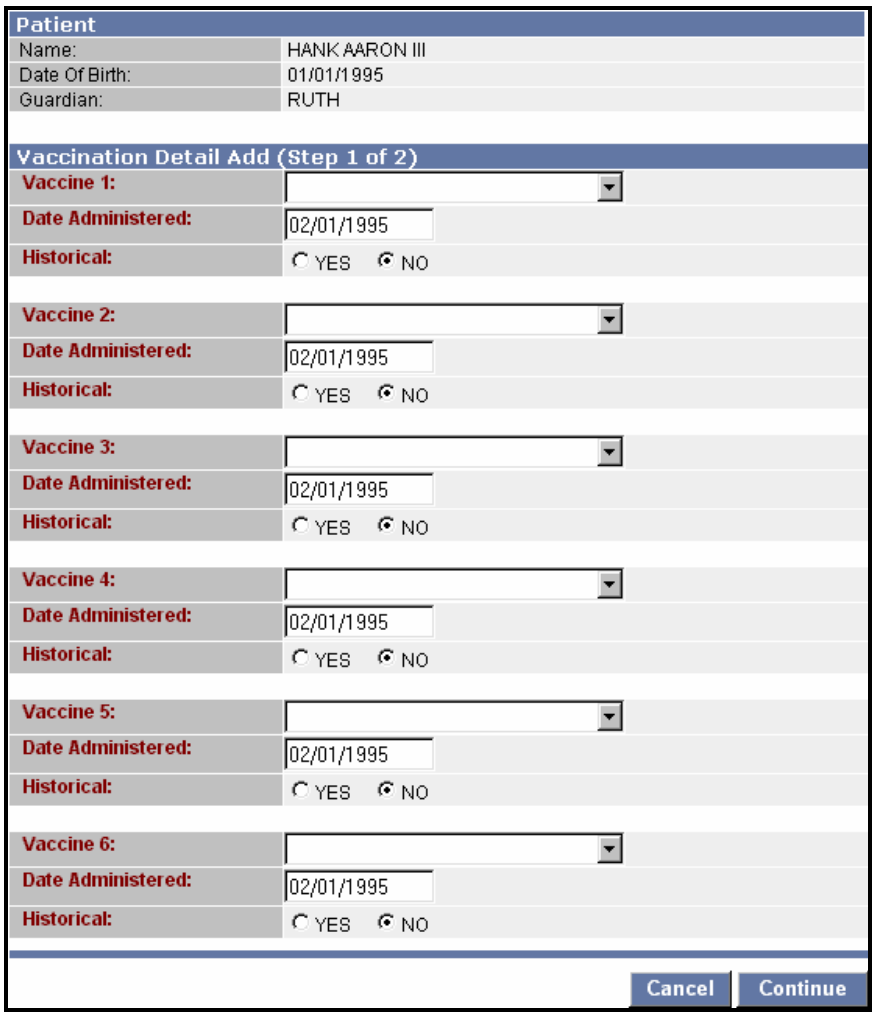


5.1.6 Adding Other Vaccinations

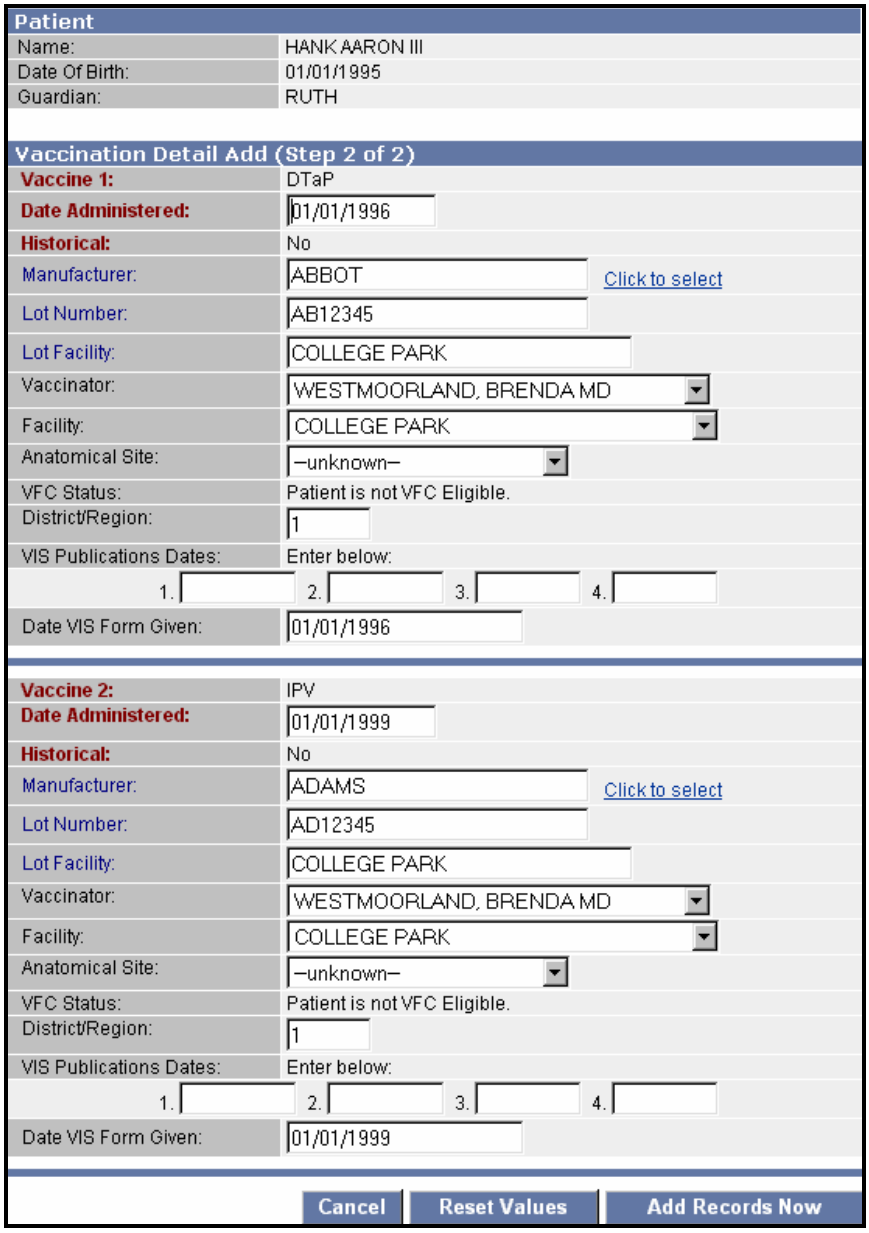
Up to six vaccines can be entered at one time by clicking on the "Add Vaccinations" button. The web application will bring up the information entry screen. From there, you can choose the type of vaccination and the date it was administered, and indicate whether or not the shot was historical or administered at the user's facility.

The system will automatically enter today's date. If you need to enter a historical date, simply type the date into the box provided. This date will remain in effect until the user changes it, or the session has ended. Additionally, it will change the dates in the rest of the date fields.

After you complete entering that information, click on "Continue" to proceed forward or click on the "Cancel" button to return to the vaccination history screen.



From here, the type of vaccination and the date administered will automatically be filled in. If you need to enter a historical date, simply type the date into the box provided. Additionally, you can enter information regarding the Manufacturer, Lot Number, Vaccinator, Facility, Anatomical Site, VFC Status, Adverse Reaction, and VIS Publication Dates. After you enter in all the pertinent information, you can either "Cancel" and return to the vaccine history screen, or "Reset Values" and start the page over, or "Add Records Now" to add the vaccinations to the central registry.



Enter the information as indicated below. Once all information is entered, click on the "Add This Record" button to enter the new information into the patient's vaccination record. If other immunizations need to be entered, you can continue to do so by repeating the steps above.

Below are the values that need to be entered for an administered vaccination:

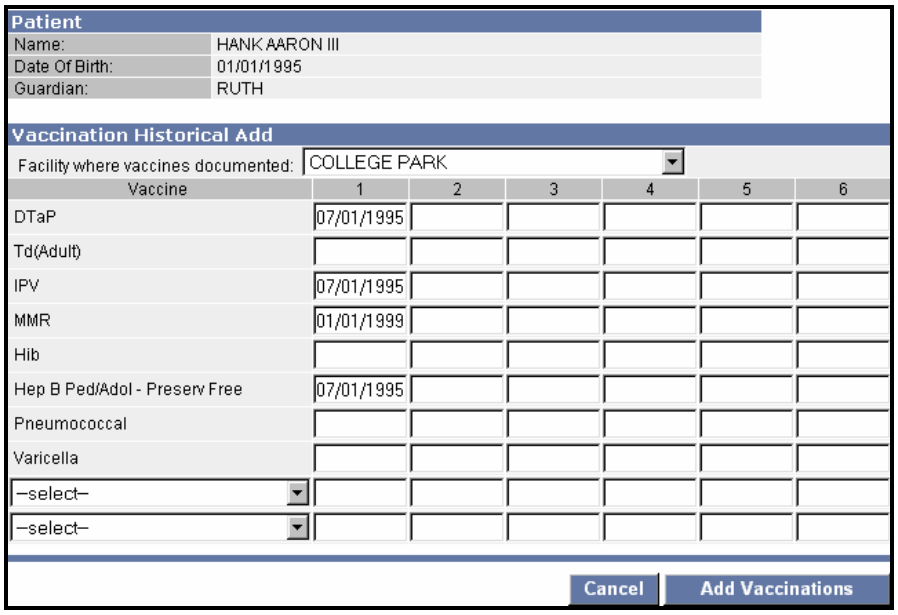
Manufacturer/ Lot Number	Select the Manufacturer/ Lot Number from the pull-down menu located to the right of the field.
Vaccinator	Select the Vaccinator who administered the vaccination from the pull-down menu located to the right of the field.
Facility	Select the Facility where the vaccination was administered from the pull-down menu located to the right of the field.
Anatomical Site	Select the Anatomical Site where the vaccination was administered from the pull-down menu located to the right of the field.
VFC Status	Select the current VFC Status for the patient from the pull-down menu located to the right of the field.
Adverse Reaction	If the patient has had an adverse reaction to the vaccination, select the appropriate reaction from the pull-down menu located to the right of the field.
VIS Publications Dates	Enter the publication dates of the VIS (Vaccine Information Statement) forms.
Date VIS Form Given	Enter the date the VIS form was provided to the patient.

Many of the above values can be set as default values in the user's "Personal Settings" as described in Section 3.

5.1.7 Adding Historical Vaccines

The web application gives the user the capability to enter historical vaccines using a grid. For example, if the patient vaccine information has never before been added to the registry, the user can enter in all historical information. Click on the "Add Historicals (Grid)" button.

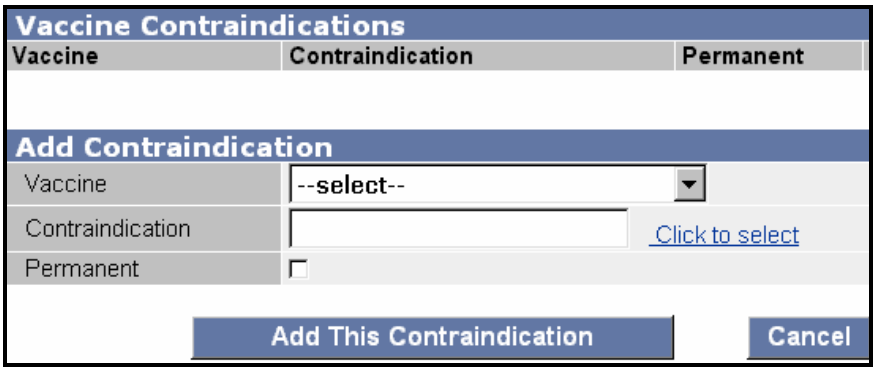
The following screen will appear. To use this grid, select a vaccine from the drop down menu provided. Use the "Tab" button to move through the boxes more easily. Once you have entered all the historical vaccine dates, click the "Add Vaccinations" button. You will be returned to the patient vaccination screen.



5.1.8 Adding Contraindications

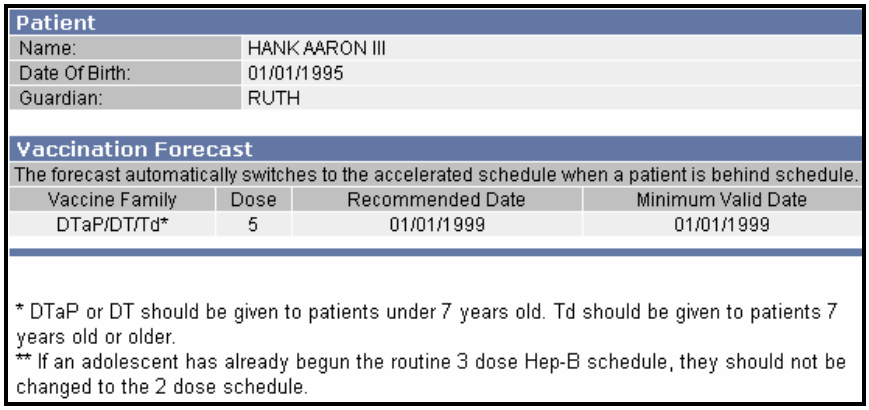
If a patient has contraindications, the "Contraindications" button will be **RED**. It is important to make sure you select the proper vaccine that the child is contraindicated for. If the medical or nursing staff notes a Contraindication or Refusal, mark the appropriate reason. When you click on a reason, only the *valid* reasons for that vaccine appear. Enter the contraindications, along with Valid ACIP reasons in the Contraindications window. If you have been given a reason that is not on this list, it is not a valid reason. *Ask the appropriate staff if you have any questions*. It is best to ascertain any problems a patient may have with certain vaccines before administering immunizations.

Note: *CASA assesses coverage levels only; contraindications and refusals will be assessed as incomplete coverage for that antigen.*



5.2 Vaccinations Menu - Forecast

Vaccination Forecasting enables you to view the shots that will be due based on the patient information that has been entered into the database using PCI-Client or the PCI Web Application. You can view a listing of shots that are due, along with their dates, for each patient. The forecast automatically switches to the accelerated schedule when a patient is behind schedule.



Patient

Name:	HANK AARON III
Date Of Birth:	01/01/1995
Guardian:	RUTH

Vaccination Forecast

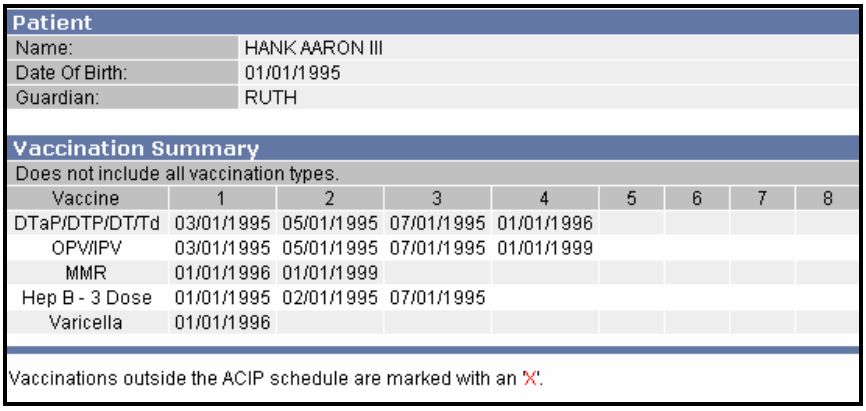
The forecast automatically switches to the accelerated schedule when a patient is behind schedule.

Vaccine Family	Dose	Recommended Date	Minimum Valid Date
DTaP/DT/Td*	5	01/01/1999	01/01/1999

* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.
** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

5.3 Vaccinations Menu – Summary

The Vaccinations Summary Menu is used to look at certain vaccine families without having to look at the complete vaccine history. It can be used as a printable report of the patient's vaccinations.



Patient

Name:	HANK AARON III
Date Of Birth:	01/01/1995
Guardian:	RUTH

Vaccination Summary

Does not include all vaccination types.

Vaccine	1	2	3	4	5	6	7	8
DTaP/DTP/DT/Td	03/01/1995	05/01/1995	07/01/1995	01/01/1996				
OPV/IPV	03/01/1995	05/01/1995	07/01/1995	01/01/1999				
MMR	01/01/1996	01/01/1999						
Hep B - 3 Dose	01/01/1995	02/01/1995	07/01/1995					
Varicella	01/01/1996							

Vaccinations outside the ACIP schedule are marked with an 'X'.

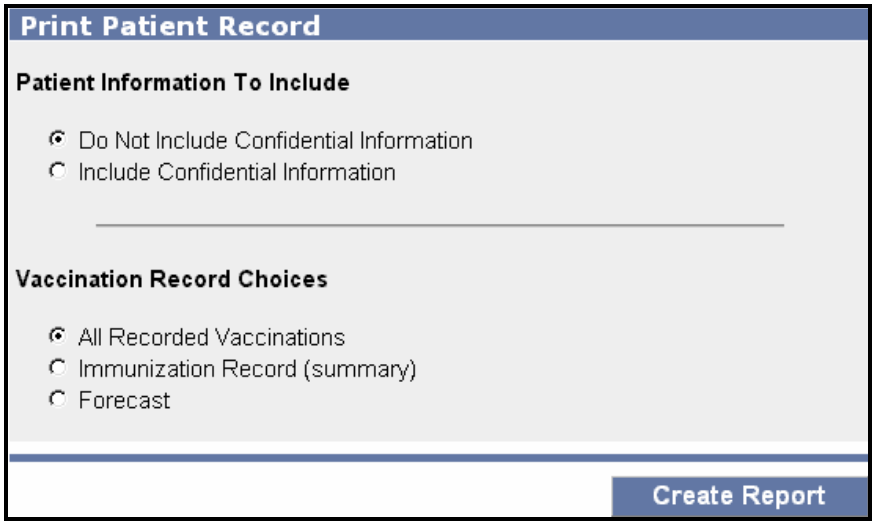
6 Reports Menu

In the Reports menu, you can select the various types of reports you may need. There is no set sequence to follow in generating the various reports available in the Web Application. It is your option, which reports you may want to view and print. It is suggested that if you are in a specific patient's record, you may wish to view and print his/her shot record. This is explained below.

There is a variety of reports that you can generate, based upon the patient information that has been entered into the web application. You can view and print a patient's immunization record and prepare immunization summary reports, patient summary and detail reports, and special reports. Clicking on "Reports Module" opens the Reports menu where you can select the various types of reports you may need.

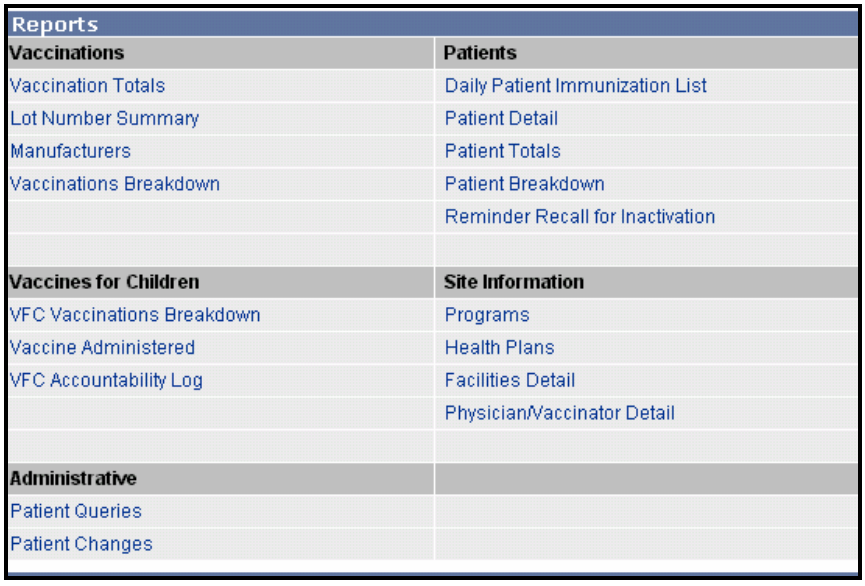
6.1 Reports Menu - Patient Record

When you have searched for a patient and found him/her, click on the menu "Patient Record". A patient report option screen will appear. In the first option, you can choose to include or not include confidential information. In the second option, there are three report choices, all recorded vaccinations, immunization record (summary), or forecast. Once you have chosen an option, click the "Print" button. A report will appear in a new window, for the patient whose demographic information you last viewed. You have the option of printing the report or just viewing it.



6.2 Reports Menu - Report Module

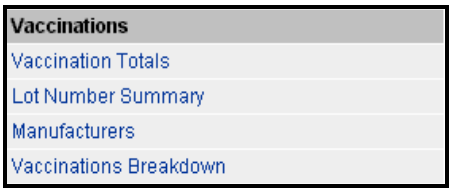
The Reports Module allows you to generate a variety of reports. Select "Reports Module" from the Reports menu.



NOTE: *In many of the following reports, you have the option of including all the items or you can limit the report by selecting specific items. If you want to include all items, simply click the "Print" button without using the "Limit Report By" selections.*

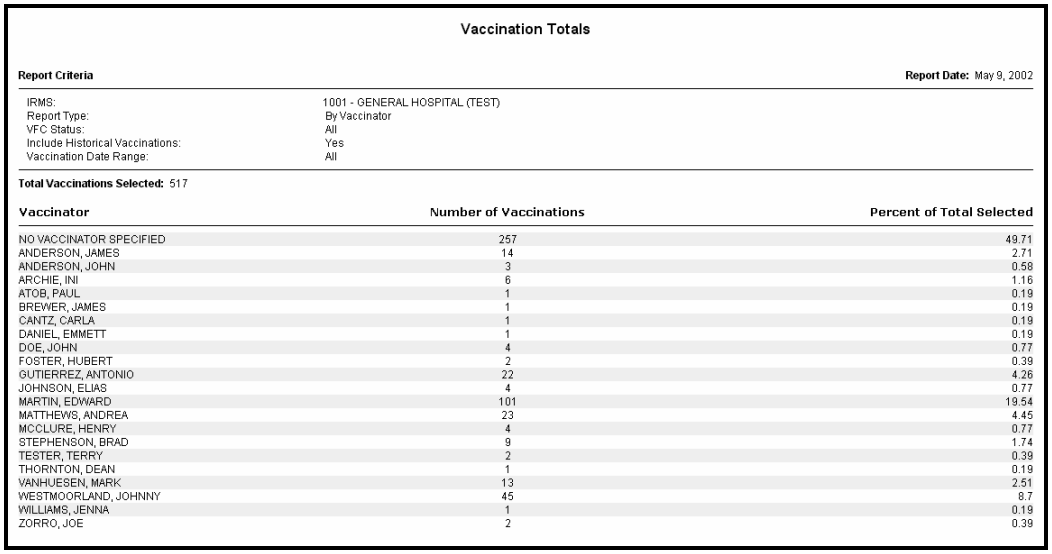
6.2.1 Vaccinations

There are a number of reports for vaccinations as described below.



6.2.1.1 Vaccine Totals

This report summarizes the total number of vaccinations by Facility, Physician/Vaccinator, Program, Health Plan or Zip Code. You can include Historical Vaccinations by clicking in the checkbox to the left. You can limit the report by Vaccination Dates by clicking in the checkbox and entering "From" and "To" dates. If these dates are entered incorrectly, an message box will open informing you of the error. Click "OK" and enter the date with the proper MM/DD/YYYY format. You can also select the VFC status Eligible, Ineligible, or All. To specify the Report Type, click in the appropriate circle to make your selection.



Vaccination Totals

Report Criteria **Report Date:** May 9, 2002

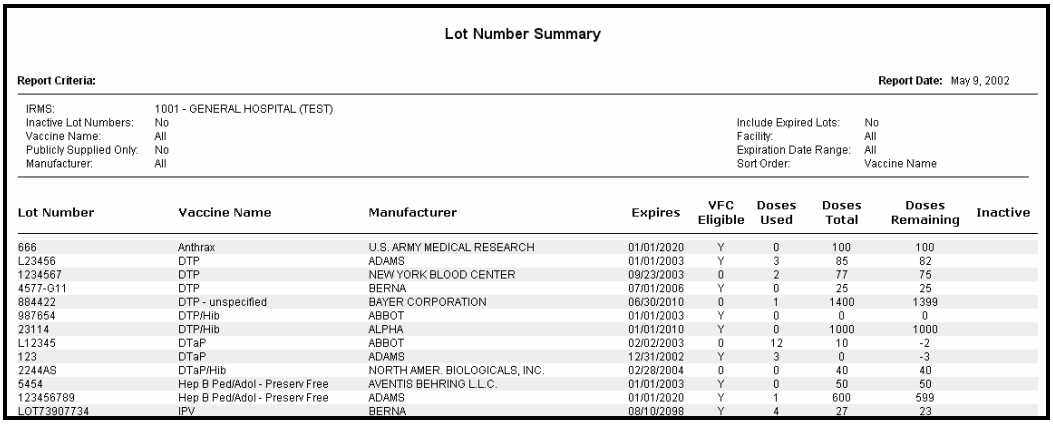
IRMS:	1001 - GENERAL HOSPITAL (TEST)
Report Type:	By Vaccinator
VFC Status:	All
Include Historical Vaccinations:	Yes
Vaccination Date Range:	All

Total Vaccinations Selected: 517

Vaccinator	Number of Vaccinations	Percent of Total Selected
NO VACCINATOR SPECIFIED	257	49.71
ANDERSON, JAMES	14	2.71
ANDERSON, JOHN	3	0.58
ARCHIE, INI	6	1.16
ATOB, PAUL	1	0.19
BREWER, JAMES	1	0.19
CANTZ, CARLA	1	0.19
DANIEL, EMMETT	1	0.19
DOE, JOHN	4	0.77
FOSTER, HUBERT	2	0.39
GUTIERREZ, ANTONIO	22	4.26
JOHNSON, ELIAS	4	0.77
MARTIN, EDWARD	101	19.54
MATTHEWS, ANDREA	23	4.45
MCCLURE, HENRY	4	0.77
STEPHENSON, BRAD	9	1.74
TESTER, TERRY	2	0.39
THORNTON, DEAN	1	0.19
VANHUESEN, MARK	13	2.51
WESTMOORLAND, JOHNNY	45	8.7
WILLIAMS, JENNA	1	0.19
ZORRO, JOE	2	0.39

6.2.1.2 Lot Number Summary

Lot Number Summary produces a report that shows a summary of the lot numbers corresponding to the vaccinations in the application. Click in the checkbox to include "inactive lot numbers" and "expired lots." Specify the Expiration Date range, by entering "From" and "To" dates. If these dates are entered incorrectly, an message box will open informing you of the error. Click "OK" and enter the date with the proper MM/DD/YYYY format. Use the pull-down menus to select Facility Name, Manufacturer, and Vaccine Name. Further, you can specify if the vaccines were VFC supplied only. Use the radio buttons (click in a circle) to specify whether you want the report ordered by Vaccine Name, Manufacturer, Expiration Date, or Lot Number.



Lot Number Summary

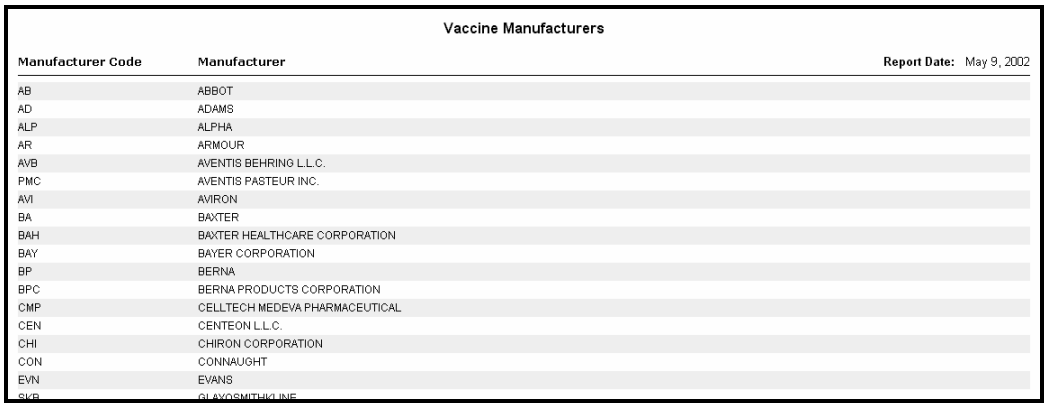
Report Criteria: **Report Date:** May 9, 2002

IRMS:	1001 - GENERAL HOSPITAL (TEST)		
Inactive Lot Numbers:	No	Include Expired Lots:	No
Vaccine Name:	All	Facility:	All
Publicly Supplied Only:	No	Expiration Date Range:	All
Manufacturer:	All	Sort Order:	Vaccine Name

Lot Number	Vaccine Name	Manufacturer	Expires	VFC Eligible	Doses Used	Doses Total	Doses Remaining	Inactive
666	Anthrax	U.S. ARMY MEDICAL RESEARCH	01/01/2020	Y	0	100	100	
L23456	DTP	ADAMS	01/01/2003	Y	3	85	82	
1234567	DTP	NEW YORK BLOOD CENTER	09/23/2003	0	2	77	75	
4577-G11	DTP	BERNA	07/01/2006	Y	0	25	25	
884422	DTP - unspecified	BAYER CORPORATION	06/30/2010	0	1	1400	1399	
987654	DTP/Hib	ABBOT	01/01/2003	Y	0	0	0	
23114	DTP/Hib	ALPHA	01/01/2010	Y	0	1000	1000	
L12345	DTaP	ABBOT	02/02/2003	0	12	10	-2	
123	DTaP	ADAMS	12/31/2002	Y	3	0	-3	
2244AS	DTaP/Hib	NORTH AMER. BIOLOGICALS, INC.	02/28/2004	0	0	40	40	
5454	Hep B Ped/Adol - Preserv Free	AVENTIS BEHRING L.L.C.	01/01/2003	Y	0	50	50	
123456789	Hep B Ped/Adol - Preserv Free	ADAMS	01/01/2020	Y	1	600	599	
LOT73907734	IPV	BERNA	08/10/2098	Y	4	27	23	

6.2.1.3 Manufacturers

This report provides a list of the manufacturers by Code and Name.



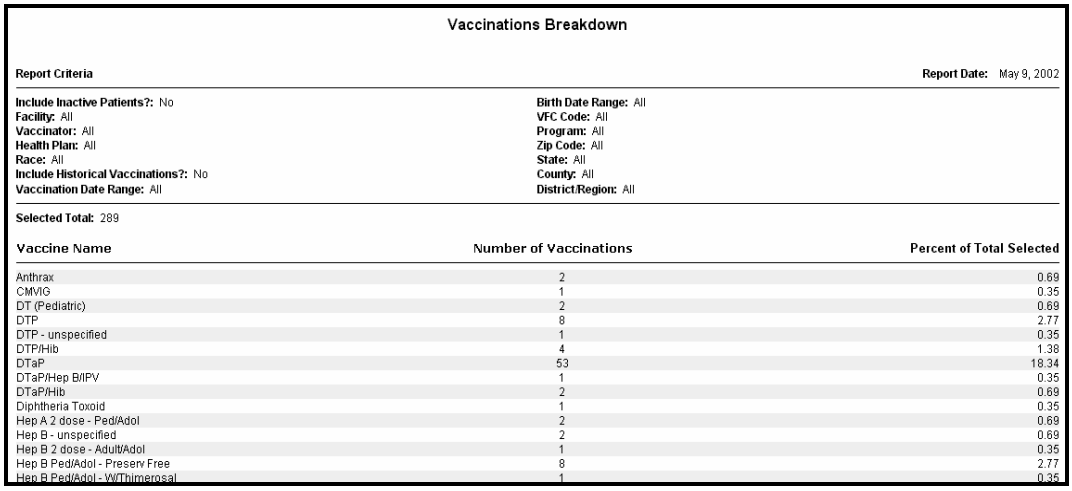
Vaccine Manufacturers

Report Date: May 9, 2002

Manufacturer Code	Manufacturer
AB	ABBOT
AD	ADAMS
ALP	ALPHA
AR	ARMOUR
AVB	AVENTIS BEHRING L.L.C.
PMC	AVENTIS PASTEUR INC.
AVI	AVIRON
BA	BAXTER
BAH	BAXTER HEALTHCARE CORPORATION
BAY	BAYER CORPORATION
BP	BERNA
BPC	BERNA PRODUCTS CORPORATION
CMP	CELLTECH MEDEVA PHARMACEUTICAL
CEN	CENTEON L.L.C.
CHI	CHIRON CORPORATION
CON	CONNAUGHT
EVN	EVANS
SKB	GLAXOSMITHKLINE

6.2.1.4 Vaccinations Breakdown

Vaccinations Breakdown produces a report that shows a summary of the number of vaccinations given. Vaccination Date Range, Birth Date Range, Facility, Physician/Vaccinator, VFC code, health plan, program, ethnic origin, and zip code can sort the report.



Vaccinations Breakdown

Report Criteria **Report Date:** May 9, 2002

Include Inactive Patients?: No
Facility: All
Vaccinator: All
Health Plan: All
Race: All
Include Historical Vaccinations?: No
Vaccination Date Range: All
Birth Date Range: All
VFC Code: All
Program: All
Zip Code: All
State: All
County: All
District/Region: All

Selected Total: 289

Vaccine Name	Number of Vaccinations	Percent of Total Selected
Anthrax	2	0.69
CMVIG	1	0.35
DT (Pediatric)	2	0.69
DTP	8	2.77
DTP - unspecified	1	0.35
DTP/Hib	4	1.38
DTaP	53	18.34
DTaP/Hep B/IPV	1	0.35
DTaP/Hib	2	0.69
Diphtheria Toxoid	1	0.35
Hep A 2 dose - Ped/Adol	2	0.69
Hep B - unspecified	2	0.69
Hep B 2 dose - Adult/Adol	1	0.35
Hep B Ped/Adol - Preserv Free	8	2.77
Hep B Ped/Adol - W/Thimerosal	1	0.35

6.2.2 Patients

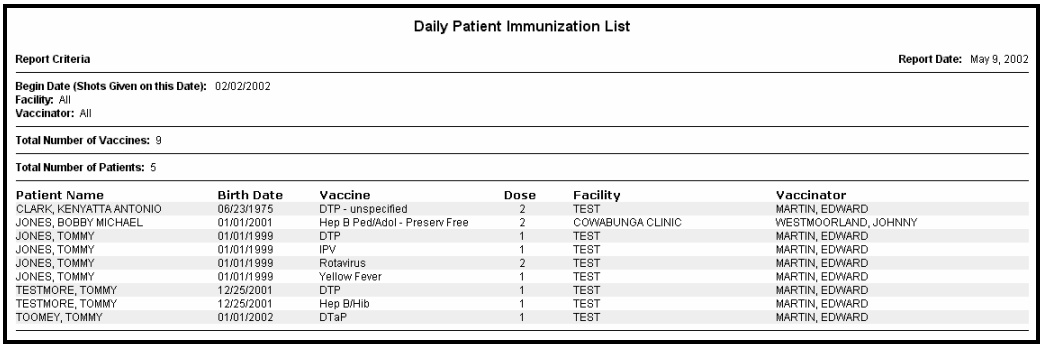
There are several patient reports available as described below.

Patients

- Daily Patient Immunization List
- Patient Detail
- Patient Totals
- Patient Breakdown
- Reminder Recall for Inactivation

6.2.2.1 Daily Patient Immunization List

This report gives a list of patients who received vaccinations for a particular date.



Daily Patient Immunization List

Report Criteria **Report Date:** May 9, 2002

Begin Date (Shots Given on this Date): 02/02/2002
Facility: All
Vaccinator: All

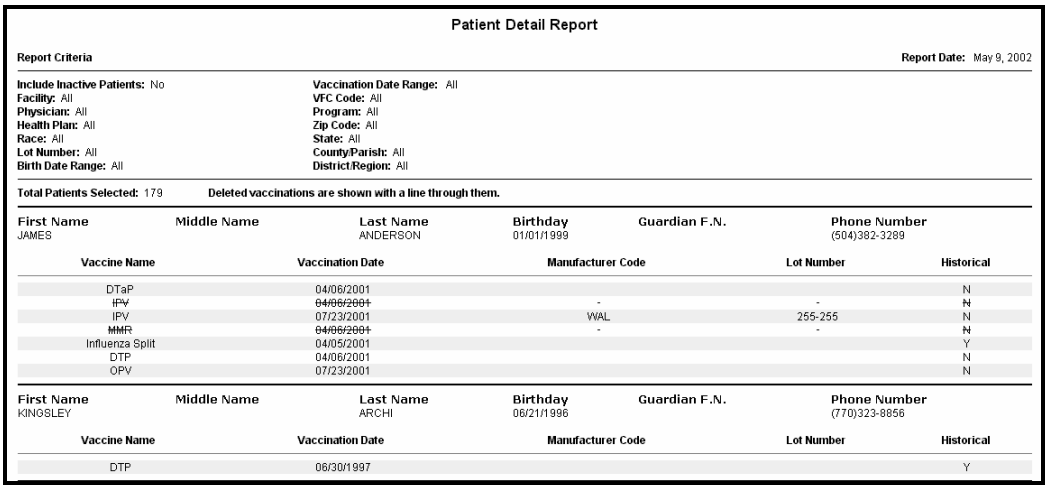
Total Number of Vaccines: 9

Total Number of Patients: 5

Patient Name	Birth Date	Vaccine	Dose	Facility	Vaccinator
CLARK, KENYATTA ANTONIO	06/23/1975	DTP - unspecified	2	TEST	MARTIN, EDWARD
JONES, BOBBY MICHAEL	01/01/2001	Hep B Ped/Adol - Preserv Free	2	COWABUNGA CLINIC	WESTMOORLAND, JOHNNY
JONES, TOMMY	01/01/1999	DTP	1	TEST	MARTIN, EDWARD
JONES, TOMMY	01/01/1999	IPV	1	TEST	MARTIN, EDWARD
JONES, TOMMY	01/01/1999	Rotavirus	2	TEST	MARTIN, EDWARD
JONES, TOMMY	01/01/1999	Yellow Fever	1	TEST	MARTIN, EDWARD
TESTMORE, TOMMY	12/25/2001	DTP	1	TEST	MARTIN, EDWARD
TESTMORE, TOMMY	12/25/2001	Hep B/Hib	1	TEST	MARTIN, EDWARD
TOOMEY, TOMMY	01/01/2002	DTaP	1	TEST	MARTIN, EDWARD

6.2.2.2 Patient Detail

This report provides detailed patient information. Vaccination Date Range, Birth Date Range, Facility, Physician/Vaccinator, Program, Health Plan, Ethnic Origin, VFC Code, Lot Number and Zip Code can sort the report. You can include "Inactive Patients" by clicking in the checkbox to the left. You can limit the report by clicking one or more of the checkboxes. For Vaccination and Birth Date ranges enter the appropriate "From" and "To" dates.



Patient Detail Report

Report Criteria **Report Date:** May 9, 2002

Include Inactive Patients: No
Facility: All
Physician: All
Health Plan: All
Race: All
Lot Number: All
Birth Date Range: All
Vaccination Date Range: All
VFC Code: All
Program: All
Zip Code: All
State: All
County/Parish: All
District/Region: All

Total Patients Selected: 179 **Deleted vaccinations are shown with a line through them.**

First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number
JAMES		ANDERSON	01/01/1999		(504)382-3289

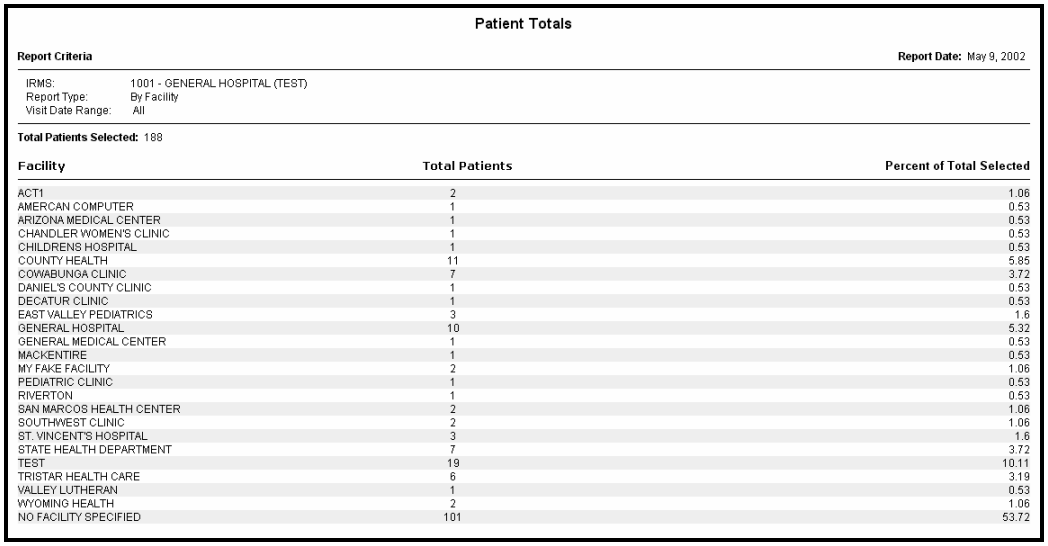
Vaccine Name	Vaccination Date	Manufacturer Code	Lot Number	Historical
DTaP	04/06/2001			N
~~IPV~~	~~04/06/2001~~	-	-	~~N~~
IPV	07/23/2001	WAL	255-255	N
~~MMR~~	~~04/06/2001~~	-	-	~~N~~
Influenza Split	04/05/2001			Y
DTP	04/06/2001			N
OPV	07/23/2001			N

First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number
KINGSLEY		ARCHI	06/21/1996		(770)323-8856

Vaccine Name	Vaccination Date	Manufacturer Code	Lot Number	Historical
DTP	06/30/1997			Y

6.2.2.3 Patient Totals

This report provides the total number of patients. Total Patients per Facility, Total Patients per Physician, Total Patients per Program, Total Patients per Health Plan or Total Patients per Zip Code can sort the report. You can limit the report by Visit date range. Click in the checkbox and enter the "From" and "To" dates. Select how you would like the report sorted by clicking in the appropriate circle.



Patient Totals

Report Criteria **Report Date:** May 9, 2002

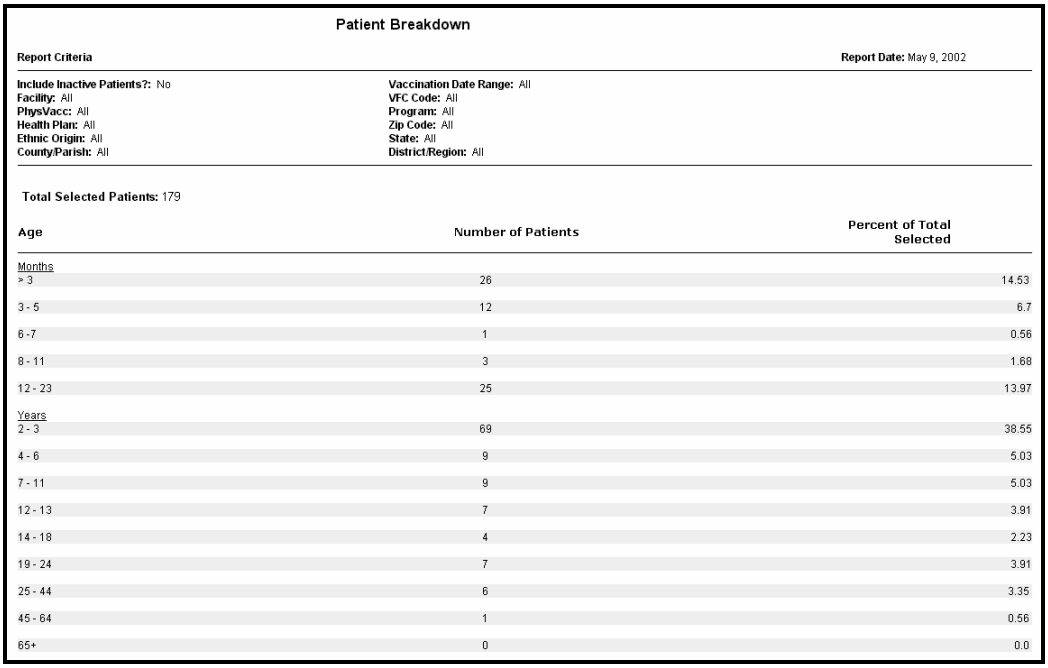
IRMS: 1001 - GENERAL HOSPITAL (TEST)
Report Type: By Facility
Visit Date Range: All

Total Patients Selected: 188

Facility	Total Patients	Percent of Total Selected
ACT1	2	1.06
AMERCAN COMPUTER	1	0.53
ARIZONA MEDICAL CENTER	1	0.53
CHANDLER WOMEN'S CLINIC	1	0.53
CHILDRENS HOSPITAL	1	0.53
COUNTY HEALTH	11	5.85
COWABUNGA CLINIC	7	3.72
DANIEL'S COUNTY CLINIC	1	0.53
DECATUR CLINIC	1	0.53
EAST VALLEY PEDIATRICS	3	1.6
GENERAL HOSPITAL	10	5.32
GENERAL MEDICAL CENTER	1	0.53
MACKENTIRE	1	0.53
MY FAKE FACILITY	2	1.06
PEDIATRIC CLINIC	1	0.53
RIVERTON	1	0.53
SAN MARCOS HEALTH CENTER	2	1.06
SOUTHWEST CLINIC	2	1.06
ST. VINCENT'S HOSPITAL	3	1.6
STATE HEALTH DEPARTMENT	7	3.72
TEST	19	10.11
TRISTAR HEALTH CARE	6	3.19
VALLEY LUTHERAN	1	0.53
WYOMING HEALTH	2	1.06
NO FACILITY SPECIFIED	101	53.72

6.2.2.4 Patient Breakdown

A report that summarizes patients by Visit Dates, Facility, Physician/Vaccinator, Program, Health Plan, Ethnic Code, VFC code and Zip Code. You can include "Inactive Patients" by clicking in the checkbox to the left. You can limit the report by clicking one or more of the checkboxes. For Visit Dates enter the "From" and "To" dates.



Patient Breakdown

Report Criteria **Report Date:** May 9, 2002

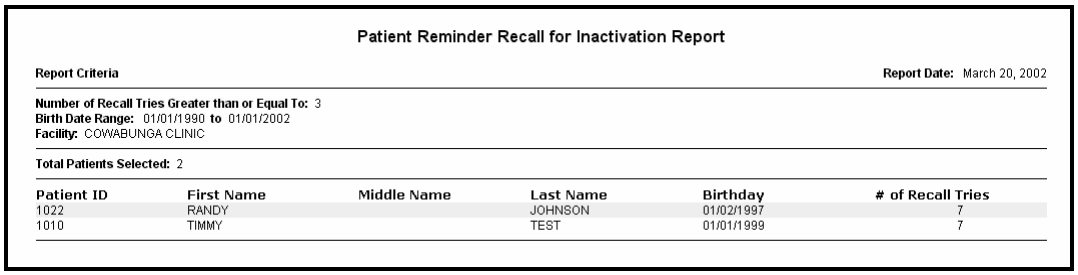
Include Inactive Patients?: No
Facility: All
PhysVacc: All
Health Plan: All
Ethnic Origin: All
County/Parish: All
Vaccination Date Range: All
VFC Code: All
Program: All
Zip Code: All
State: All
District/Region: All

Total Selected Patients: 179

Age	Number of Patients	Percent of Total Selected
Months		
> 3	26	14.53
3 - 5	12	6.7
6 - 7	1	0.56
8 - 11	3	1.68
12 - 23	25	13.97
Years		
2 - 3	69	38.55
4 - 6	9	5.03
7 - 11	9	5.03
12 - 13	7	3.91
14 - 18	4	2.23
19 - 24	7	3.91
25 - 44	6	3.35
45 - 64	1	0.56
65+	0	0.0

6.2.2.5 Reminder Recall for Inactivation

This report provides information regarding the patients that have exceeded the number of recall tries defined by the user. This information is useful for deactivating patients that do not respond to the recall.



Patient Reminder Recall for Inactivation Report

Report Criteria **Report Date:** March 20, 2002

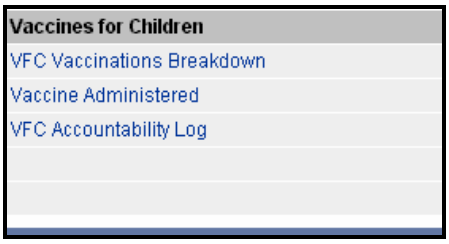
Number of Recall Tries Greater than or Equal To: 3
Birth Date Range: 01/01/1990 **to** 01/01/2002
Facility: COWABUNGA CLINIC

Total Patients Selected: 2

Patient ID	First Name	Middle Name	Last Name	Birthday	# of Recall Tries
1022	RANDY		JOHNSON	01/02/1997	7
1010	TIMMY		TEST	01/01/1999	7

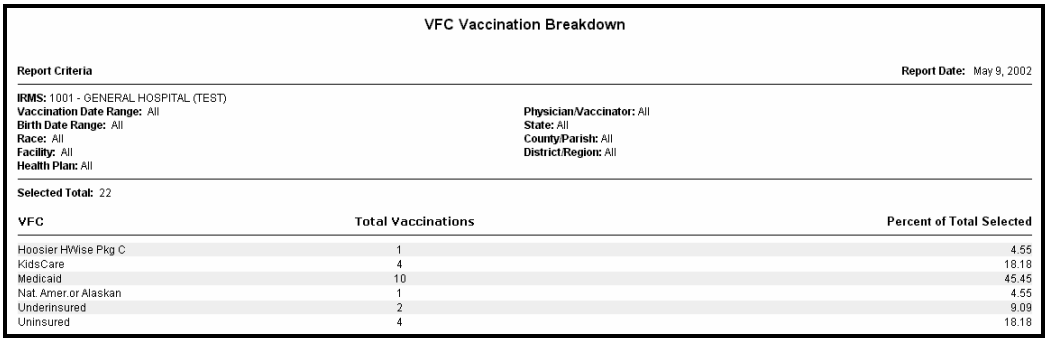
6.2.3 Vaccines for Children

The Vaccines for Children reports are described below.



6.2.3.1 VFC Vaccinations Breakdown

VFC Breakdown generates a report that breaks down the VFC vaccinations by Vaccination Date Range, Patient Birth Date Range, and Ethnic Code. Click in the checkbox for Vaccination Date Range and/or Patient Birth Date Range and enter the appropriate "From" and "To" dates. To include an Ethnic Code, click in the checkbox and select an ethnic code from the pull-down menu.



VFC Vaccination Breakdown

Report Criteria **Report Date:** May 9, 2002

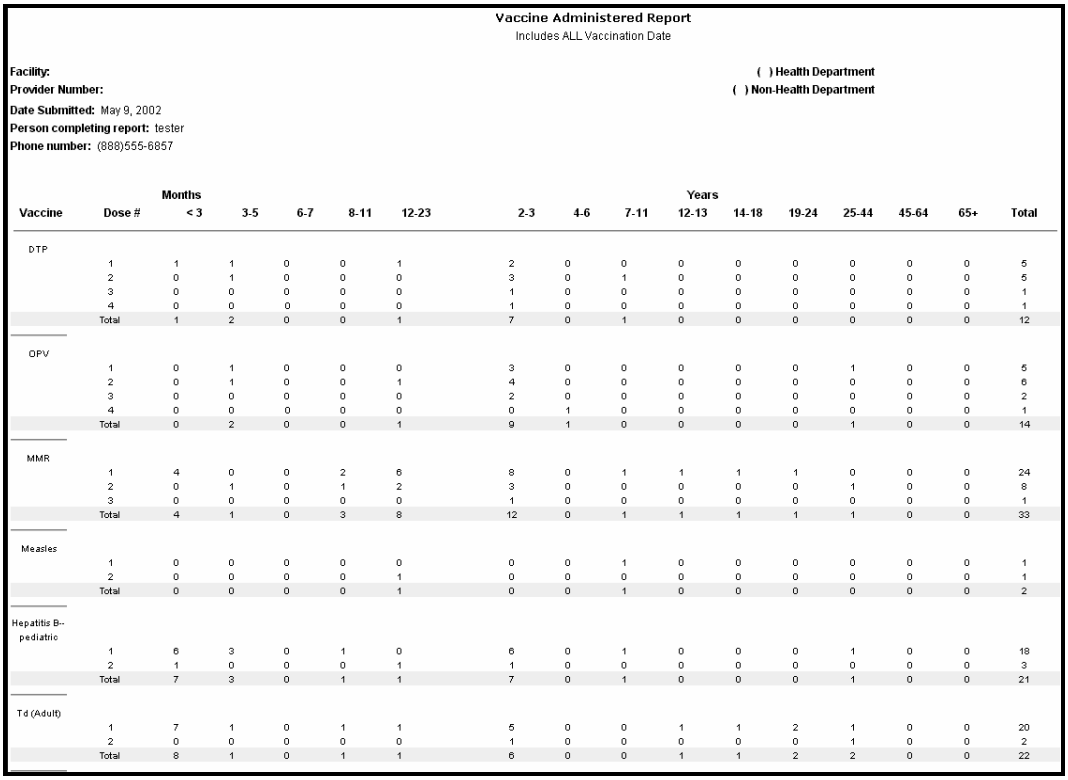
IRMS: 1001 - GENERAL HOSPITAL (TEST)
Vaccination Date Range: All
Birth Date Range: All
Race: All
Facility: All
Health Plan: All
Physician/Vaccinator: All
State: All
County/Parish: All
District/Region: All

Selected Total: 22

VFC	Total Vaccinations	Percent of Total Selected
Hoosier HWise Pkg C	1	4.55
KidsCare	4	18.18
Medicaid	10	45.45
Nat. Amer.or Alaskan	1	4.55
Underinsured	2	9.09
Uninsured	4	18.18

6.2.3.2 Vaccine Administered

Generates a report of the vaccines administered. Enter the name of the person completing the report, along with a phone number. You have two print options: By Vaccine or By Lot. (Click the appropriate button.) You can limit the report by Vaccination Date Range and Facility by clicking in the appropriate checkboxes. Enter the "From" and "To" dates for the Vaccination Date Range. Select the Facility from the pull-down menu. Click in the appropriate circle to select VFC Eligibility (VFC Eligible Vaccinations Only or All Vaccinations).



Vaccine Administered Report

Includes ALL Vaccination Date

Facility: ( ) **Health Department**

Provider Number: ( ) **Non-Health Department**

Date Submitted: May 9, 2002

Person completing report: tester

Phone number: (888)555-6857

		Months					Years									
Vaccine	**Dose #**	**< 3**	**3-5**	**6-7**	**8-11**	**12-23**	**2-3**	**4-6**	**7-11**	**12-13**	**14-18**	**19-24**	**25-44**	**45-64**	**65+**	**Total**
DTP																
	1	1	1	0	0	1	2	0	0	0	0	0	0	0	0	5
	2	0	1	0	0	0	3	0	1	0	0	0	0	0	0	5
	3	0	0	0	0	0	1	0	0	0	0	0	0	0	0	1
	4	0	0	0	0	0	1	0	0	0	0	0	0	0	0	1
	Total	1	2	0	0	1	7	0	1	0	0	0	0	0	0	12
OPV																
	1	0	1	0	0	0	3	0	0	0	0	0	1	0	0	5
	2	0	1	0	0	1	4	0	0	0	0	0	0	0	0	6
	3	0	0	0	0	0	2	0	0	0	0	0	0	0	0	2
	4	0	0	0	0	0	0	1	0	0	0	0	0	0	0	1
	Total	0	2	0	0	1	9	1	0	0	0	0	1	0	0	14
MMR																
	1	4	0	0	2	6	8	0	1	1	1	1	0	0	0	24
	2	0	1	0	1	2	3	0	0	0	0	0	1	0	0	8
	3	0	0	0	0	0	1	0	0	0	0	0	0	0	0	1
	Total	4	1	0	3	8	12	0	1	1	1	1	1	0	0	33
Measles																
	1	0	0	0	0	0	0	0	1	0	0	0	0	0	0	1
	2	0	0	0	0	1	0	0	0	0	0	0	0	0	0	1
	Total	0	0	0	0	1	0	0	1	0	0	0	0	0	0	2
Hepatitis B--pediatric																
	1	6	3	0	1	0	6	0	1	0	0	0	1	0	0	18
	2	1	0	0	0	1	1	0	0	0	0	0	0	0	0	3
	Total	7	3	0	1	1	7	0	1	0	0	0	1	0	0	21
Td (Adult)																
	1	7	1	0	1	1	5	0	0	1	1	2	1	0	0	20
	2	0	0	0	0	0	1	0	0	0	0	0	1	0	0	2
	Total	8	1	0	1	1	6	0	0	1	1	2	2	0	0	22

6.2.3.3 VFC Accountability Log

This generates a report from the VFC Accountability Log. Click in the checkbox to the left, if you want to "Include Ineligible Patients". You can limit the report by "Vaccination Date Range" and "Facility" by clicking in the appropriate checkboxes. Enter the "From" and "To" dates for the Vaccination Date Range and select the Facility from the pull-down menu.

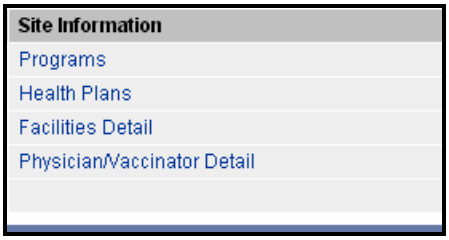
Vaccines For Children (VFC) Program
Vaccine Accountability Log for Public Provider/Hospital(Private and Public) Use

Includes both VFC Eligibles(0 - 18 years) and VFC Ineligibles

Patient Date of Birth	Patient Vacc Date	Medi -caid	Un- insured	Amer Indian or Alaskan	Under- insured	Not Elig	DTaP	DT Peds	TD (>= 7yrold)	DTP/ Hib	Hib	Hib HR	Hep B /Hib	OPV	IPV	MMR	Hep B Peds	Hep B HR- Infants	Hep B Adol	Vari- cella	Hep A
01/01/1999	12/20/2001						x	x	x	x				x	x	x				x	x
		Medi -caid	Un- insured	Amer Indian or Alaskan	Under- insured	Not Elig	DTaP	DT Peds	TD (>= 7yrold)	DTP/ Hib	Hib	Hib HR	Hep B /Hib	OPV	IPV	MMR	Hep B Peds	Hep B HR- Infants	Hep B Adol	Vari- cella	Hep A
Totals		0	0	0	0	0	1	1	1	1	0	0	0	1	1	1	0	0	0	1	1

6.2.4 Site Information

The available Site-related reports are described below.



6.2.4.1 Programs

A report that shows the names of the programs available, and whether they are active or not.

Programs

Name	Inactive	Report Date: May 9, 2002
KIDSHOTS		
KIDVACCS		
PASPORT		
WIC		

6.2.4.2 Health Plans

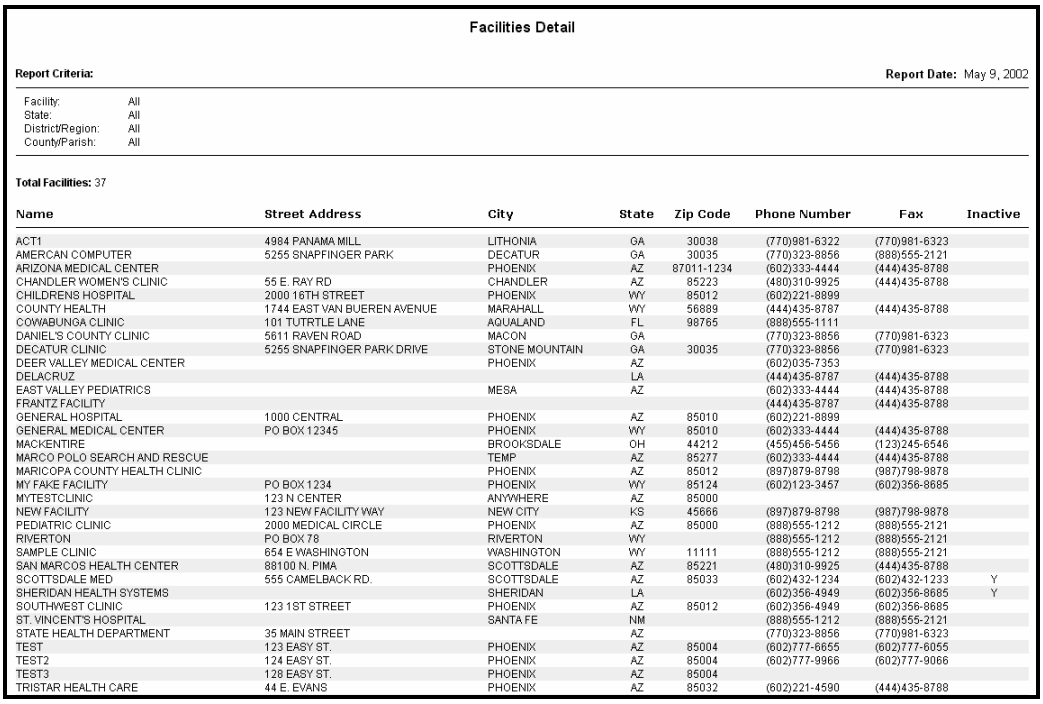
A report that summarizes the health plans available, along with their status (i.e. inactive, active, or Medicaid).

Health Plans

Name	Medicaid	Inactive	Report Date: May 9, 2002
AETNA			
CIGNA			
INTERGROUP			
RED CROSS			

6.2.4.3 Facilities Detail

This report summarizes the facilities detail available. You can limit the report to a specific Facility by selecting one from the pull-down menu, or click the Print button to include all facilities.



Facilities Detail

Report Criteria: **Report Date:** May 9, 2002

Facility: All
State: All
District/Region: All
County/Parish: All

Total Facilities: 37

Name	Street Address	City	State	Zip Code	Phone Number	Fax	Inactive
ACT1	4984 PANAMA MILL	LITHONIA	GA	30038	(770)981-6322	(770)981-6323	
AMERCAN COMPUTER	5255 SNAPFINGER PARK	DECATUR	GA	30035	(770)323-8856	(888)555-2121	
ARIZONA MEDICAL CENTER		PHOENIX	AZ	87011-1234	(602)333-4444	(444)435-8788	
CHANDLER WOMEN'S CLINIC	55 E. RAY RD	CHANDLER	AZ	85223	(480)310-9925	(444)435-8788	
CHILDRENS HOSPITAL	2000 16TH STREET	PHOENIX	WY	85012	(602)221-8899		
COUNTY HEALTH	1744 EAST VAN BUEREN AVENUE	MARAHALL	WY	56889	(444)435-8787	(444)435-8788	
COWABUNGA CLINIC	101 TUTRTLE LANE	AQUALAND	FL	98765	(888)555-1111		
DANIEL'S COUNTY CLINIC	5611 RAVEN ROAD	MACON	GA		(770)323-8856	(770)981-6323	
DECATUR CLINIC	5255 SNAPFINGER PARK DRIVE	STONE MOUNTAIN	GA	30035	(770)323-8856	(770)981-6323	
DEER VALLEY MEDICAL CENTER		PHOENIX	AZ		(602)035-7353		
DELACRUZ			LA		(444)435-8787	(444)435-8788	
EAST VALLEY PEDIATRICS		MESA	AZ		(602)333-4444	(444)435-8788	
FRANTZ FACILITY					(444)435-8787	(444)435-8788	
GENERAL HOSPITAL	1000 CENTRAL	PHOENIX	AZ	85010	(602)221-8899		
GENERAL MEDICAL CENTER	PO BOX 12345	PHOENIX	WY	85010	(602)333-4444	(444)435-8788	
MACKENTIRE		BROOKSDALE	OH	44212	(455)456-5456	(123)245-6546	
MARCO POLO SEARCH AND RESCUE		TEMP	AZ	85277	(602)333-4444	(444)435-8788	
MARICOPA COUNTY HEALTH CLINIC		PHOENIX	AZ	85012	(897)879-8798	(987)798-9878	
MY FAKE FACILITY	PO BOX 1234	PHOENIX	WY	85124	(602)123-3457	(602)356-8685	
MYTESTCLINIC	123 N CENTER	ANYWHERE	AZ	85000			
NEW FACILITY	123 NEW FACILITY WAY	NEW CITY	KS	45666	(897)879-8798	(987)798-9878	
PEDIATRIC CLINIC	2000 MEDICAL CIRCLE	PHOENIX	AZ	85000	(888)555-1212	(888)555-2121	
RIVERTON	PO BOX 78	RIVERTON	WY		(888)555-1212	(888)555-2121	
SAMPLE CLINIC	654 E WASHINGTON	WASHINGTON	WY	11111	(888)555-1212	(888)555-2121	
SAN MARCOS HEALTH CENTER	88100 N. PIMA	SCOTTSDALE	AZ	85221	(480)310-9925	(444)435-8788	
SCOTTSDALE MED	555 CAMELBACK RD.	SCOTTSDALE	AZ	85033	(602)432-1234	(602)432-1233	Y
SHERIDAN HEALTH SYSTEMS		SHERIDAN	LA		(602)356-4949	(602)356-8685	Y
SOUTHWEST CLINIC	123 1ST STREET	PHOENIX	AZ	85012	(602)356-4949	(602)356-8685	
ST. VINCENT'S HOSPITAL		SANTA FE	NM		(888)555-1212	(888)555-2121	
STATE HEALTH DEPARTMENT	35 MAIN STREET		AZ		(770)323-8856	(770)981-6323	
TEST	123 EASY ST.	PHOENIX	AZ	85004	(602)777-6655	(602)777-6055	
TEST2	124 EASY ST.	PHOENIX	AZ	85004	(602)777-9966	(602)777-9066	
TEST3	128 EASY ST.	PHOENIX	AZ	85004			
TRISTAR HEALTH CARE	44 E. EVANS	PHOENIX	AZ	85032	(602)221-4590	(444)435-8788	

6.2.4.4 Physician/Vaccinator Detail

This report summarizes Physician/Vaccinator details. Facility and Physician Vaccinator sort this report. You can limit the report by a specific Physician/Vaccinator and Facility, by clicking in the appropriate checkboxes, or you can include all Physicians/Vaccinators and Facilities by just clicking the "Print" button.

Physician/Vaccinator Detail

Report Criteria: **Report Date:** January 31, 2001

Physician/Vaccinator:	All
State:	All
Facility:	All
County:	All
District:	All

Physician/Vaccinator Total: 6

First Name	Middle Name	Last Name	Suffix	Bomex DO	Phone	Fax	Inactive
SEAN	HENRY	ADAMS	III		(797)807-7986	(987)332-7972	
DONNIE		DOOLITTLE			(602)555-6644	(602)555-4466	
HEIDI		MARTINEZ			(209)398-2893	(209)398-2894	
KELLY		MATTHEWS			(934)302-9082		
MARK	KENDALL	MONROE			(390)238-9238		
JOHN	HENRY	SMITH	MD		(602)555-6464		

6.2.5 Administrative

The Administrative Reports are used in conjunction with the Security Module. The Security Module is used to track who is searching for a patient's record, or who is making changes to the patient's record. The reports will display the information from the Security Module.

6.2.5.1 Patient Queries

This report tracks who has queried for a specific patients record. To run the report, fill in the patient information and click the "Create Report" button. Click the back button on the browser to return to the previous screen.

Patient Queries Report

Report Date: July 12, 2002

Patient Data
First Name: Tommy
Last Name: Test
Birth Date: 01/01/2001

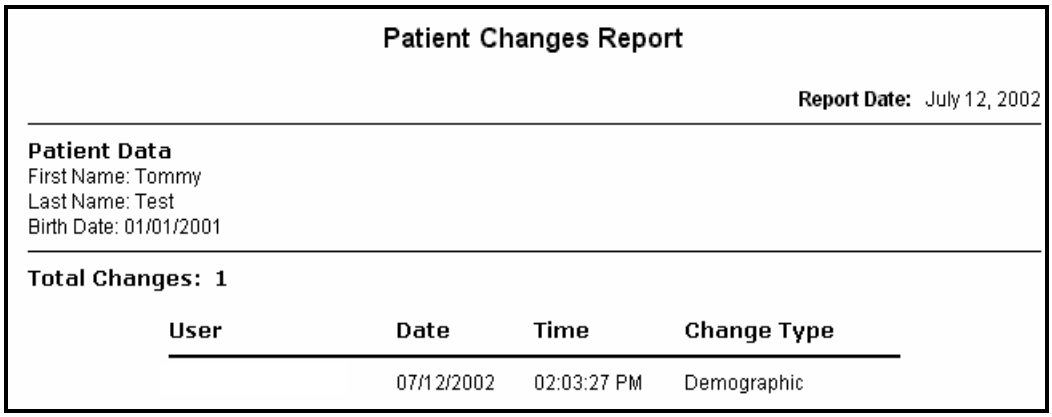
Total Queries: 0

Date	Time	User	Facility

6.2.5.2 Patient Changes

This report tracks who has made changes to a specific patients record. To run the report, fill in the patient information and click the "Create Report" button. Click the back

button on the browser to return to the previous screen.



Patient Changes Report

Report Date: July 12, 2002

Patient Data
First Name: Tommy
Last Name: Test
Birth Date: 01/01/2001

Total Changes: 1

User	Date	Time	Change Type
	07/12/2002	02:03:27 PM	Demographic

6.3 Reports Menu - State Reports

The state reports are a set of customizable reports that apply only to the specific needs of a particular state. For more information, refer to **Appendix B**.

Note: *For more information on this feature, contact your State Immunization Consultant/Coordinator.*

6.4 Reports Menu - Management Reports

The Management Report Module is also a customizable reporting tool for upper level managers to reflect immunization rates, to make assessments on information, or to recall patients throughout an IRMS, county, region, state, etc. For more information, refer to **Appendix C**.

Note: *For more information on this feature, contact your State Immunization Consultant/Coordinator.*

7 CASA Export

7.1 About WinCASA

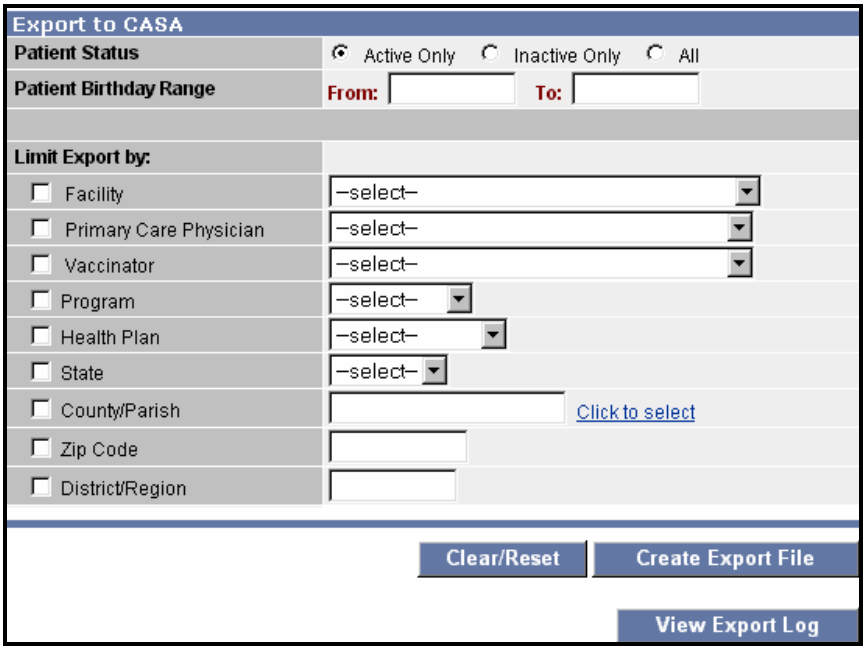
To conduct immunization assessments, the Web Application exports a file for use by **WinCASA (Windows version of the Clinic Assessment Software Application)**. WinCASA is a separate software package that has been developed by the Centers for Disease Control and Prevention to assess immunization coverage rates in a standard manner.

The **Standards for Pediatric Immunization Practices** state that providers conduct semi-annual audits to assess immunization coverage levels and to review immunization records in the patient populations they serve. In both, the public and private sector, the assessment of immunization services for pre-school-aged patients should include audits of immunization records or inspection of a random sample of records to determine the immunization coverage level. Additionally, identify how frequently opportunities for simultaneous immunization are missed, and to assess the quality of documentation. The results of assessments should be discussed by providers as part of their ongoing quality assurance reviews and used to develop solutions to the problems identified.

The primary purpose of the WinCASA is to help providers implement this recommended practice. WinCASA can also be used to collect information on all clinical encounters in order to assess if providers utilize all clinical encounters to screen for needed vaccines and, when indicated, immunize children.

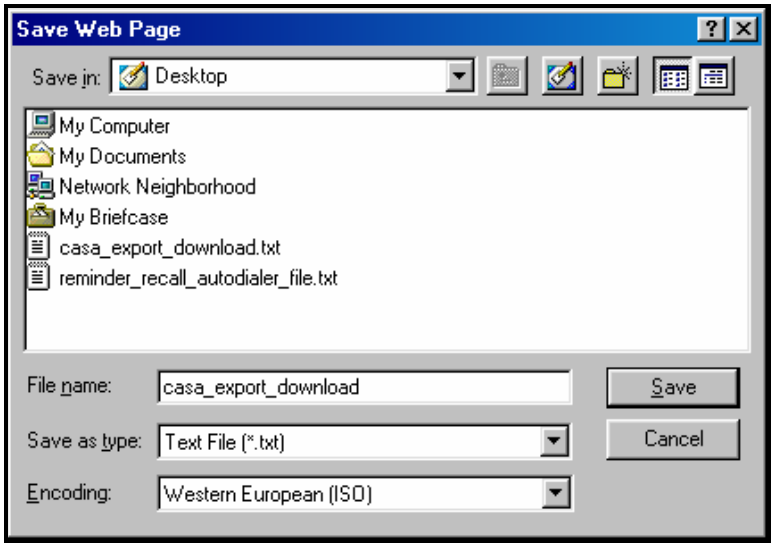
7.2 Using CASA Export

From the Main Menu select CASA Export. This will bring up the CASA Export screen as shown below.



NOTE: *In this section, you have the option of including all the items or you can limit the report by selecting specific items. If you want to include all items, simply click the "Create Export File" button without using the "Limit Recall Group By" selections.*

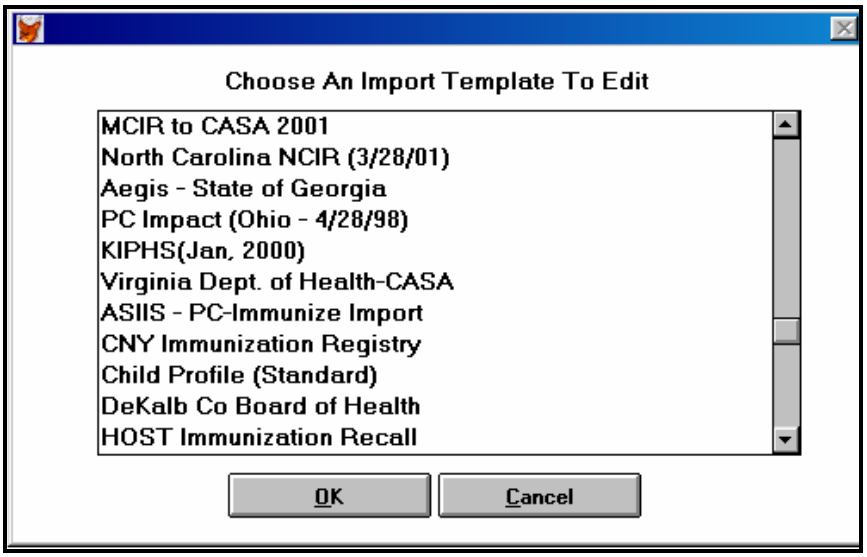
1. Select the status. The patient status window allows users to select active, inactive, or all the patients in the database assigned to the user.
2. Enter the range of birth dates for the patients you wish to export. This entry is Mandatory, as indicated by the "From" and "To" labels in red.
3. Select limiting factors. In this section, the user has choices to use in limiting the export. Keep in mind, the more the search is limited, the less information is likely to be returned.
    a. Check the box to the left of the selection.
    b. Select the appropriate item from the drop down menu by clicking on the arrow to the right of the field.
4. Run Export. Once all the settings are selected, click on the "Create Export File" button. One of two things is going to happen:
    a. A "Save" window will pop up
    b. Alternatively, it will print to the screen. If it prints to the screen, click on "File" from the menu bar and click "Save As…" and a window will appear as shown below. The name of the file does not matter; however, before you click on the ".txt" extension. Finally, remember where you save this file so you can retrieve it later using WinCASA. Instructions for editing an existing template in winCASA follow.



7.3 Using winCASA

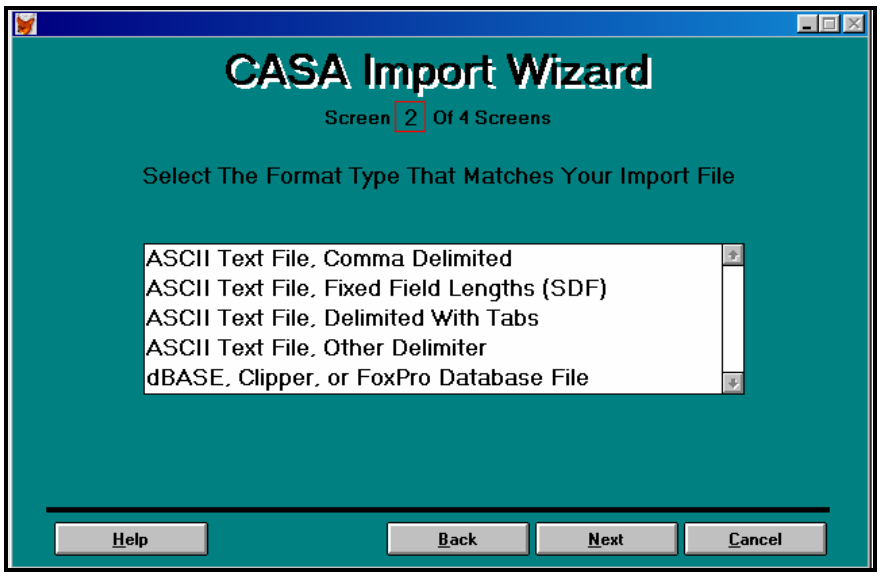
Open winCASA to perform the import from the IWeb export to CASA.

1. From the start menu, go to Programs/CASA for Windows/CASA for Windows.
2. The process starts by selecting "**Assessment Site/Import/Edit existing template**." A window opens to choose the template.

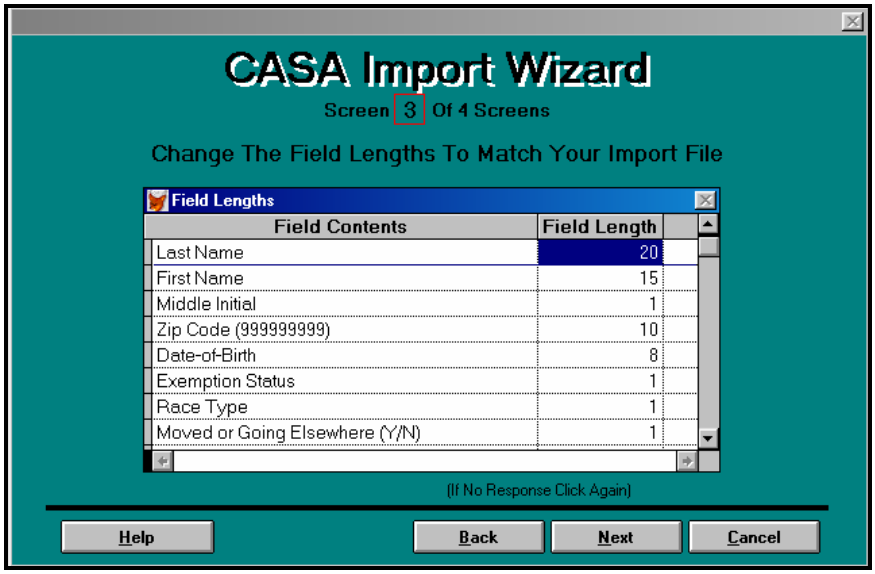


3. Choose the ASIIS PC Immunize Import template.
4. An edit wizard should open. It starts with one of five screens, even though it says four:
   a. The first screen is used to select the existing fields to use. Skip this screen by pressing the "Next" button.

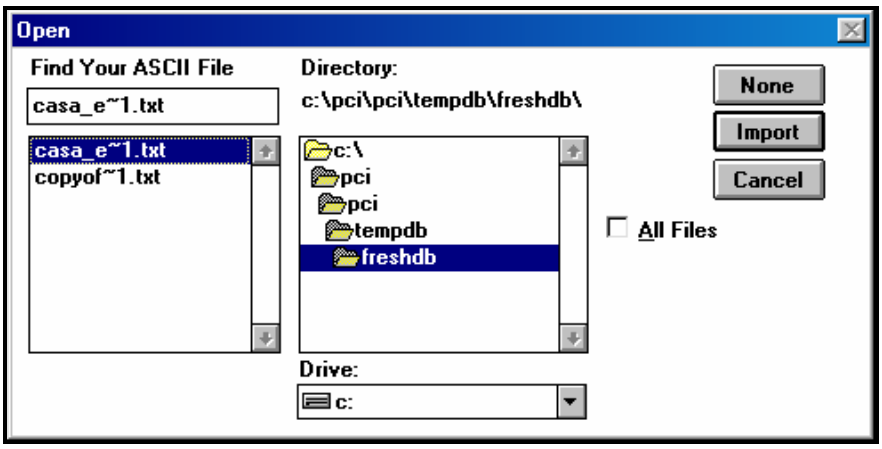
b. The second screen is used to select the format. Select the ASCII Text, Comma-Delimited format. Click the "Next" button.



c. The third screen is used to select the field lengths to match the import file. Skip this screen by pressing the "Next" button.



d. The fourth screen is used to select the file that will be imported. Select the file created by the IWeb CASA Export. Click the "Import" button.



e. The fourth screen is used to name the template. Choose a name that will be easy to remember. This only needs to be done once. Once finished, click the "Finish" button.

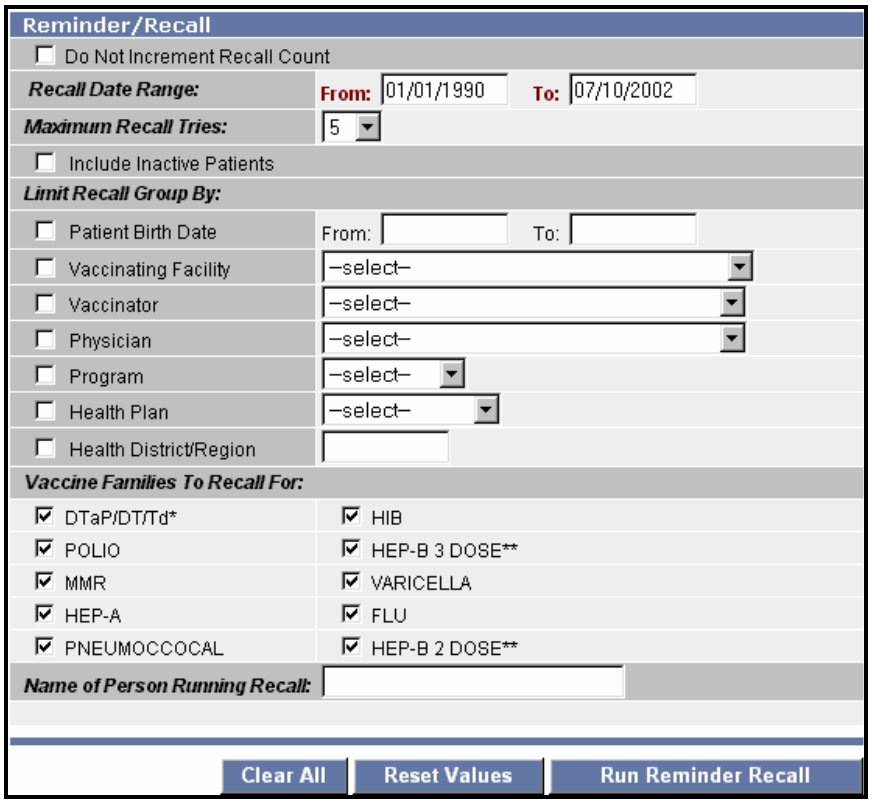
f. From here, the winCASA application will be used. For more information about the winCASA application, the winCASA User's Manual can be downloaded from the CDC web site at: *http://www.cdc.gov/nip/casa/c_userguide.htm*

Note: *The template for web export for CASA will be available in the next release of winCASA from the CDC.*

8 Reminder Recall

8.1 Reminder Recall Basics

Reminder Recall can be used to make a report, a mailing label list, a phone list to be used with an AutoDialer, or a post card list. The purpose of these is for contacting patients about upcoming or past due vaccinations. Click on Reminder Recall from the main menu. The Reminder Recall screen will appear, as shown below.



8.1.1 Do Not Increment Recall Count

When Reminder/Recall is run, typically, it will add a count to the patient record. This means that every time the patient is sent a reminder, the application keeps track of how many times it has been sent. After so many recalls, the patient will no longer be notified he/she is due for vaccinations. This checkbox is very useful for running a test recall.

8.1.2 Recall Date Range

By default, the dates 01/01/1990 and the current date are already in the box. If you wish to change the recall date range, type the date range of the recall by clicking on the box next to the date. Make sure the correct date format is used: mm/dd/yyyy.

8.1.3 Maximum Recall Tries

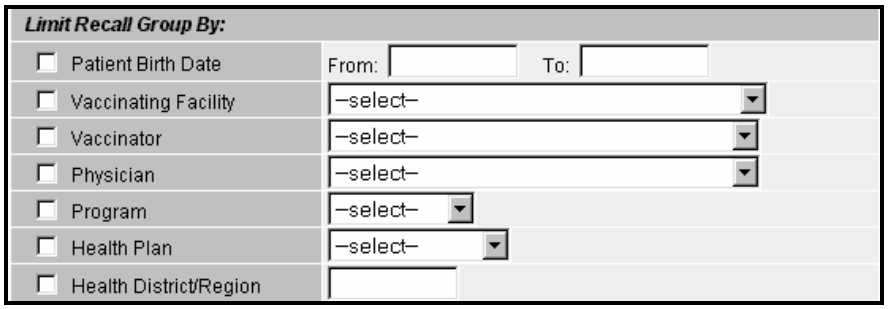
You can assign the number of times to recall a patient, if they do not respond. The number is set by selecting the arrow on the drop down menu, next to the box. Click the number that you wish to set the recall tries to. Once the date and maximum recall tries are entered, move to the Limit Recall Group By area and select the criteria in which to limit your recall summary.

8.1.4 Limit Recall Group By

Under this section, you have the choices to use in limiting the recall. Keep in mind, the more you limit the search, less information is likely to be returned. By limiting the recall, it produces a summary of the patients who are due for immunizations by the selected fields.

NOTE: *In this section, you have the option of including all the items or you can limit the report by selecting specific items. If you want to include all items, simply click the "Run Reminder Recall" button without using the "Limit Recall Group By" selections.*

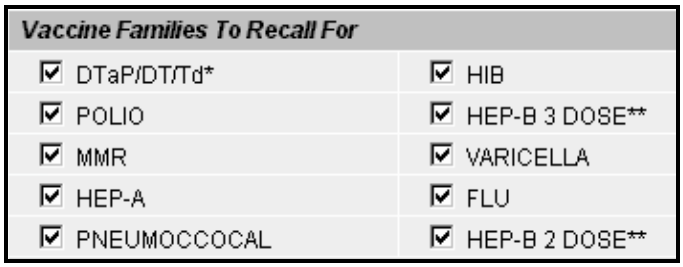
Select the criteria by clicking in the box to the left of your choice, then click on "select" to make a specific selection. In the birth date and district box, you will have to manually enter the information.



8.1.5 Vaccine Families To Recall

You can assign which vaccines families to recall. In the box of Vaccine Families To Recall For, is a list of available vaccine families to choose from. These are already set up in the application. Any changes to this list will need to go through your Systems Administrator. Click in the check box next to a vaccine to select or unselect from the list.

If an error has been made and you wish to select other vaccines, click on the check box and the entry will be added or removed. Repeat the steps above to re-run the reminder recall.

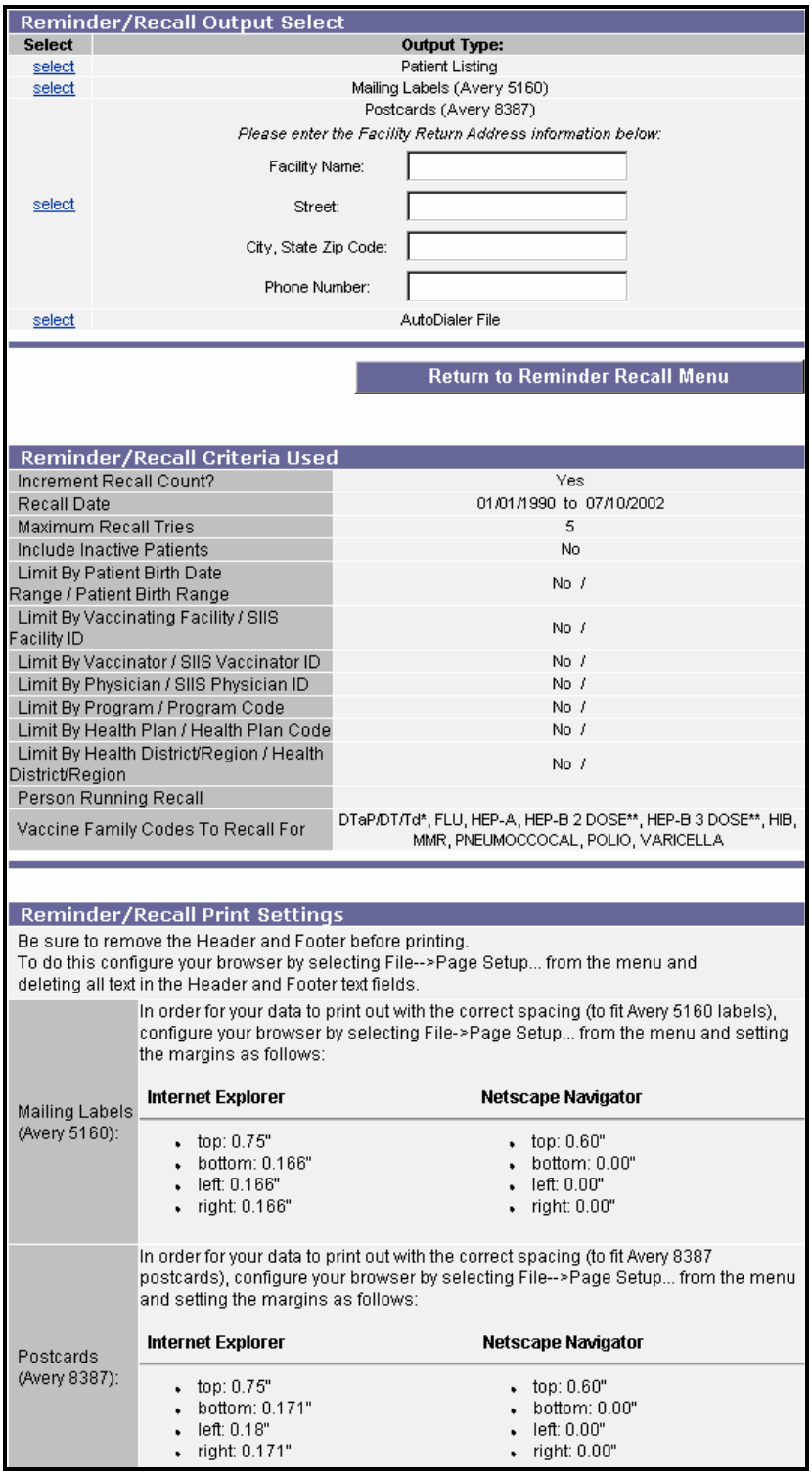


8.1.6 Name of Person Running Recall

Enter your first and last name. This information is added to the Patient Listing report.

8.2 Run Reminder Recall

Once you have entered the criteria and made all your selections and choices for the search, click on the "Run Reminder Recall" button. This will open a page that allows you to choose the output options, view the criteria used in the search, and instructions on how to set up the print settings for each individual output option.



Reminder/Recall Output Select

Select	Output Type:
select	Patient Listing
select	Mailing Labels (Avery 5160)
	Postcards (Avery 8387)
	Please enter the Facility Return Address information below:
	Facility Name:
select	Street:
	City, State Zip Code:
	Phone Number:
select	AutoDialer File

Return to Reminder Recall Menu

Reminder/Recall Criteria Used

Increment Recall Count?	Yes
Recall Date	01/01/1990 to 07/10/2002
Maximum Recall Tries	5
Include Inactive Patients	No
Limit By Patient Birth Date Range / Patient Birth Range	No /
Limit By Vaccinating Facility / SIIS Facility ID	No /
Limit By Vaccinator / SIIS Vaccinator ID	No /
Limit By Physician / SIIS Physician ID	No /
Limit By Program / Program Code	No /
Limit By Health Plan / Health Plan Code	No /
Limit By Health District/Region / Health District/Region	No /
Person Running Recall	
Vaccine Family Codes To Recall For	DTaP/DT/Td*, FLU, HEP-A, HEP-B 2 DOSE**, HEP-B 3 DOSE**, HIB, MMR, PNEUMOCCOCAL, POLIO, VARICELLA

Reminder/Recall Print Settings

Be sure to remove the Header and Footer before printing.
To do this configure your browser by selecting File-->Page Setup... from the menu and deleting all text in the Header and Footer text fields.

Mailing Labels (Avery 5160):

In order for your data to print out with the correct spacing (to fit Avery 5160 labels), configure your browser by selecting File->Page Setup... from the menu and setting the margins as follows:

Internet Explorer	Netscape Navigator
• top: 0.75"	• top: 0.60"
• bottom: 0.166"	• bottom: 0.00"
• left: 0.166"	• left: 0.00"
• right: 0.166"	• right: 0.00"

Postcards (Avery 8387):

In order for your data to print out with the correct spacing (to fit Avery 8387 postcards), configure your browser by selecting File-->Page Setup... from the menu and setting the margins as follows:

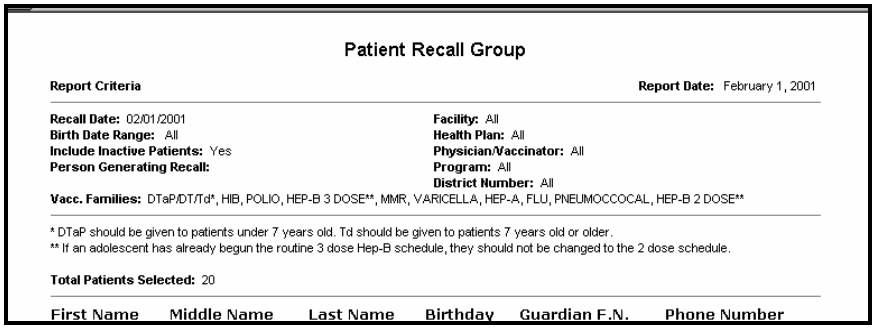
Internet Explorer	Netscape Navigator
• top: 0.75"	• top: 0.60"
• bottom: 0.171"	• bottom: 0.00"
• left: 0.18"	• left: 0.00"
• right: 0.171"	• right: 0.00"

8.2.1 Output Type

Reminder Recall gives you four choices for output of the information that is generated.

8.2.1.1 Patient Listing

Select Patient Listing and a report will be generated with the patient information. The screen appears as follows with all your patient names and information. Click on the "back" button on the browser to return to the Reminder Recall Output screen.



Patient Recall Group

Report Criteria **Report Date:** February 1, 2001

Recall Date: 02/01/2001
Birth Date Range: All
Include Inactive Patients: Yes
Person Generating Recall:
Facility: All
Health Plan: All
Physician/Vaccinator: All
Program: All
District Number: All

Vacc. Families: DTaP/DT/Td*, HIB, POLIO, HEP-B 3 DOSE**, MMR, VARICELLA, HEP-A, FLU, PNEUMOCCOCAL, HEP-B 2 DOSE**

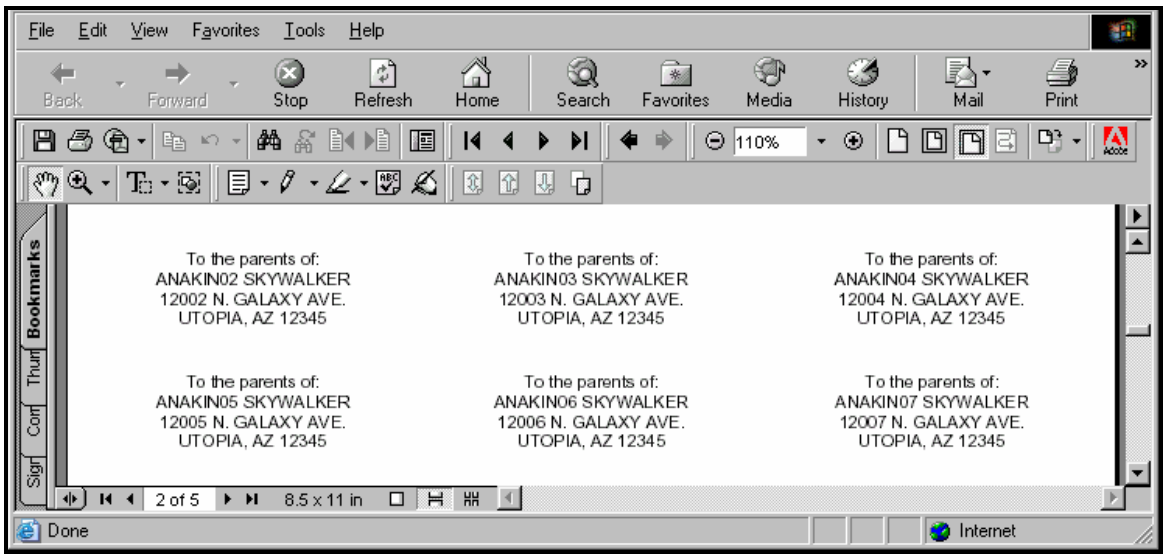
* DTaP should be given to patients under 7 years old. Td should be given to patients 7 years old or older.
** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

Total Patients Selected: 20

First Name | Middle Name | Last Name | Birthday | Guardian F.N. | Phone Number

8.2.1.2 Mailing Labels (Avery 5160)

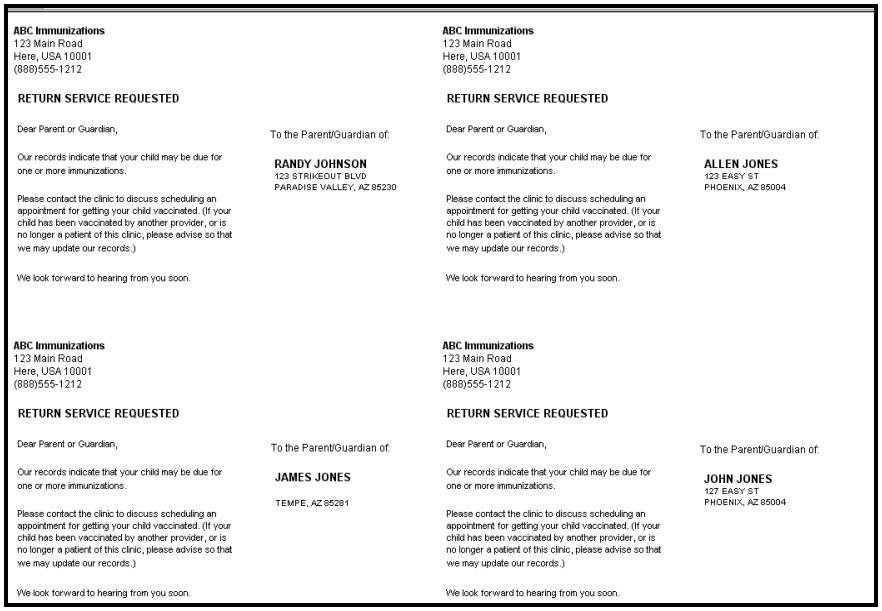
This allows you to print labels with the Patient's address so that reminders can be sent by mail. This is set up to run with Avery 5160 Mailing Labels using pdf format. After selecting Run Reminder Recall, click the Select link to display a print preview of all the patient labels. Before printing the labels, refer to the Reminder/Recall Print Settings section.



To print the labels select the print option from the browser. Click on the "back" button on the browser to return to the Reminder Recall Output screen.

8.2.1.3 Postcards (Avery 8387)

This allows you to print postcards with the Patient's address so that reminders can be sent by mail. This is set up to run with Avery 8387 Postcards. After selecting Run Reminder Recall, click the Select link to display a print preview of all the patient postcards. Before printing the postcards, refer to the Reminder/Recall Print Settings section.



ABC Immunizations
123 Main Road
Here, USA 10001
(888)555-1212

RETURN SERVICE REQUESTED

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations.

Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)

We look forward to hearing from you soon.

To the Parent/Guardian of:

RANDY JOHNSON
123 STRIKEOUT BLVD
PARADISE VALLEY, AZ 85230

ABC Immunizations
123 Main Road
Here, USA 10001
(888)555-1212

RETURN SERVICE REQUESTED

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations.

Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)

We look forward to hearing from you soon.

To the Parent/Guardian of:

ALLEN JONES
123 EASY ST
PHOENIX, AZ 85004

ABC Immunizations
123 Main Road
Here, USA 10001
(888)555-1212

RETURN SERVICE REQUESTED

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations.

Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)

We look forward to hearing from you soon.

To the Parent/Guardian of:

JAMES JONES

TEMPE, AZ 85281

ABC Immunizations
123 Main Road
Here, USA 10001
(888)555-1212

RETURN SERVICE REQUESTED

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations.

Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)

We look forward to hearing from you soon.

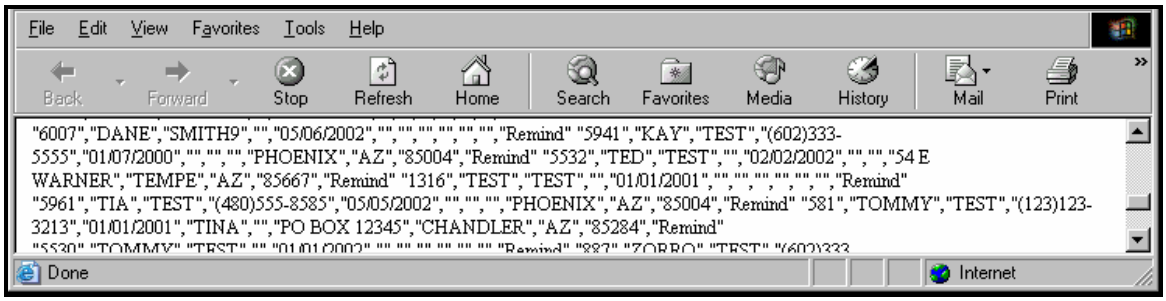
To the Parent/Guardian of:

JOHN JONES
127 EASY ST
PHOENIX, AZ 85004

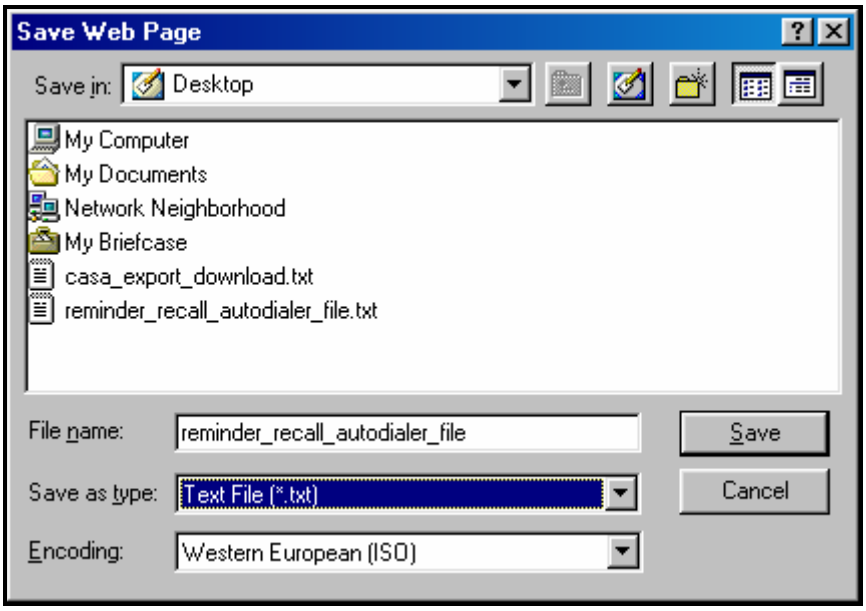
To print this page, select the print option from the browser. Click the "back" button on the browser to return to the Reminder Recall Output window.

8.2.1.4 Auto Dialer File

Select the AutoDialer File to create a file of all the patients that you would like to contact by telephone reminder. After you click on the "Run Reminder Recall" button, click the "Select" link. That should download a file to be used with Autodialer. To print this page, select the print option from the browser.



If it prints to the screen, as shown above, click on "File" from the menu bar then the "Save As" menu item. A dialog box, similar to the one below, should appear, allowing you to choose the save location and type. Make sure you save the file with a ".txt" extension.



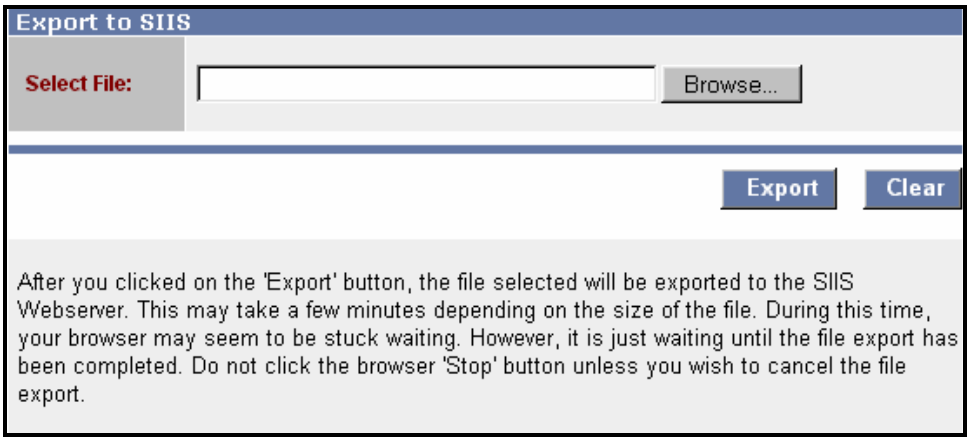
9 Exports Menu

9.1 About Exports

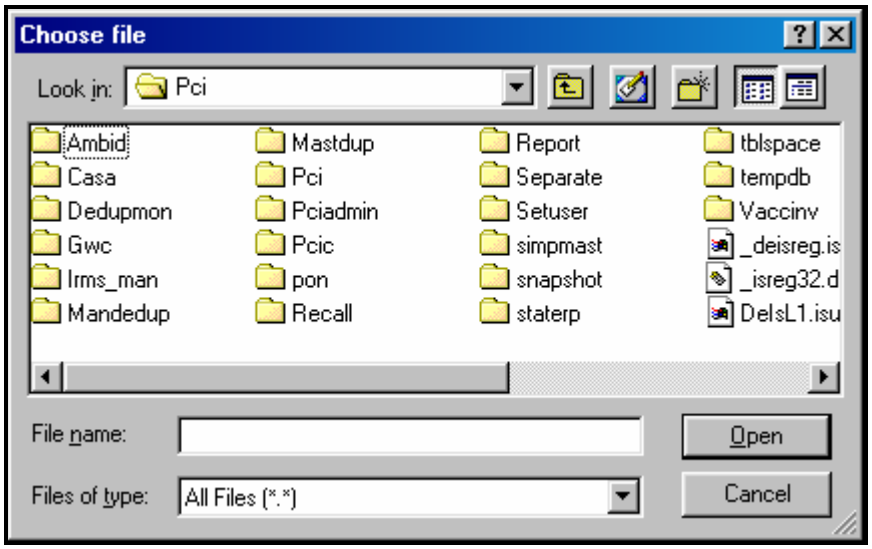
The Exports menu items allow users to send information directly to the registry from a patient management system, PCI2000, or other sources, as long as they meet the specific requirements for the type of export they are performing.

9.2 Exports Menu - HL7/SIIS

To upload a file, click the browse button to find the file.



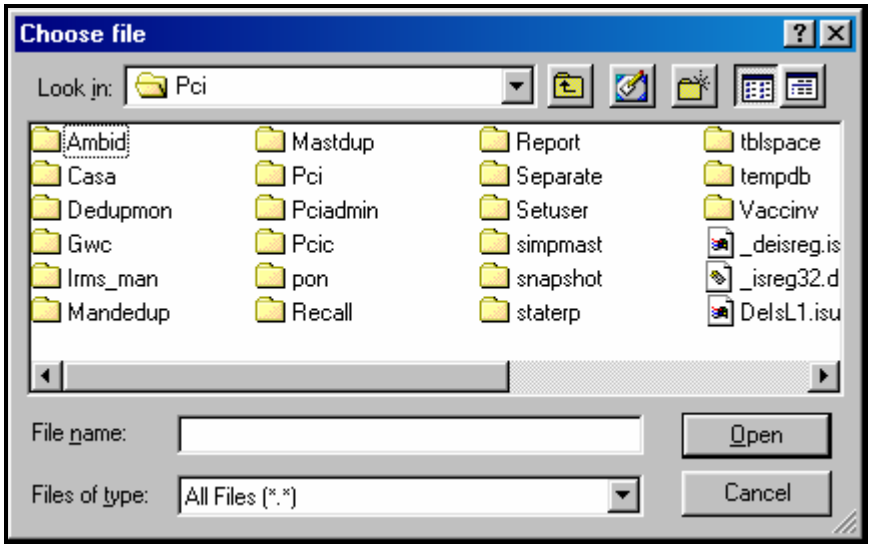
Once you click the "Open" button, you will be returned to the export screen in the IWEB application. Next, click the "Export" button to send the file to be processed by the Registry personnel.



9.3 Exports Menu - DTT

To upload a file, click the browse button to find the file.

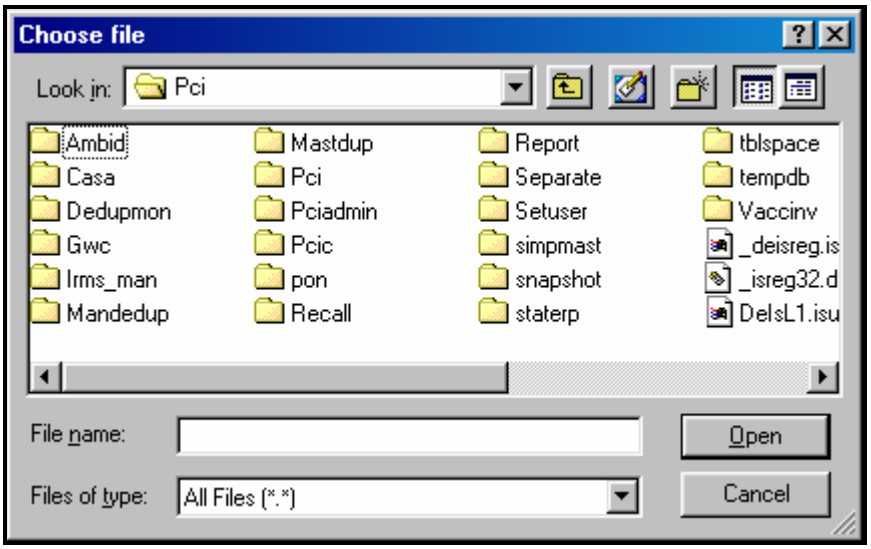
Once you click the "Open" button, you will be returned to the export screen in the IWEB application. Next, click the "Export" button to send the file to be processed by the Registry personnel.



9.4 Exports Menu - PCIC

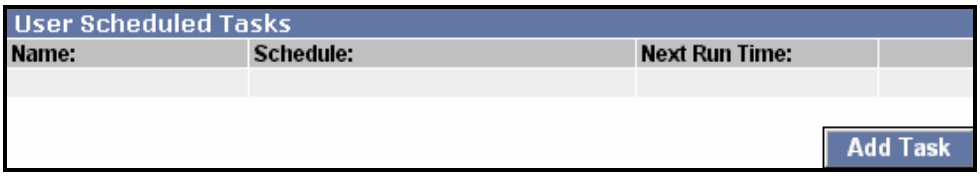
To upload a file, click the browse button to find the file.

Once you click the "Open" button, you will be returned to the export screen in the IWEB application. Next, click the "Export" button to send the file to be processed by the Registry personnel.



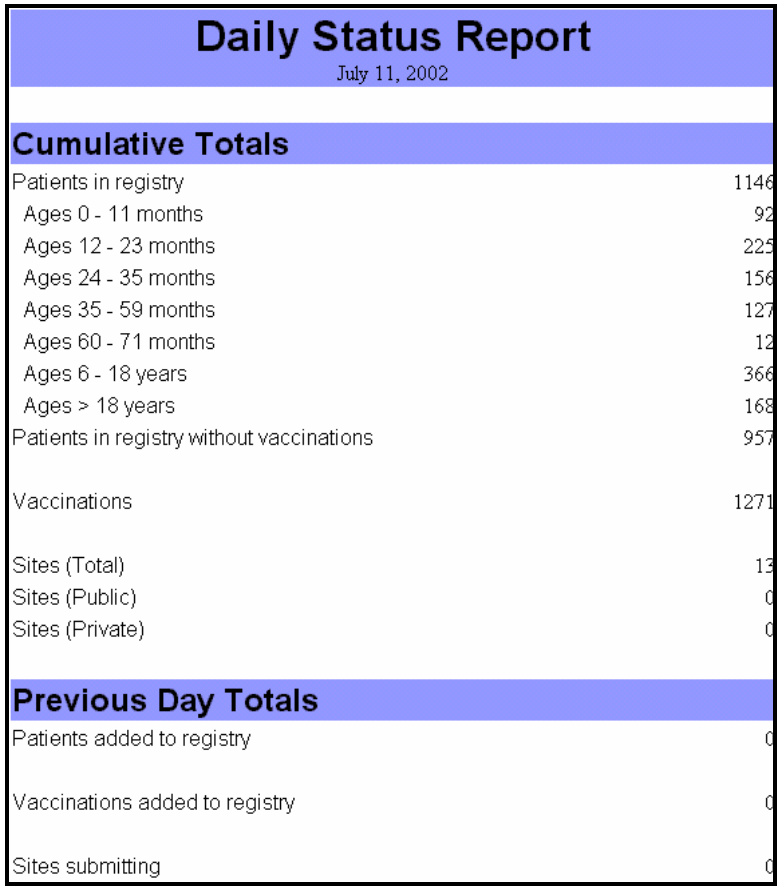
10 UFM - User Feedback Module

The Feedback System is an automated administrative tool that provides summary statistics to clients submitting data to a central registry, and creates management reports for registry administration. The Feedback System has the ability to disseminate these reports by facsimile or electronic mail. This feedback consists of statistics on records submitted by providers. The UFM provides the following information to administrator, as well as providers and users.



10.1 Daily Status Report

Daily Status Report task generates a daily snapshot of the basic statistics of the registry. The Daily Status Report configuration page allows the user to select the IRMS' and facilities that the Daily Status Report should be emailed to. The other box allows the user to enter in additional email addresses separated by commas.



Daily Status Report

July 11, 2002

Cumulative Totals

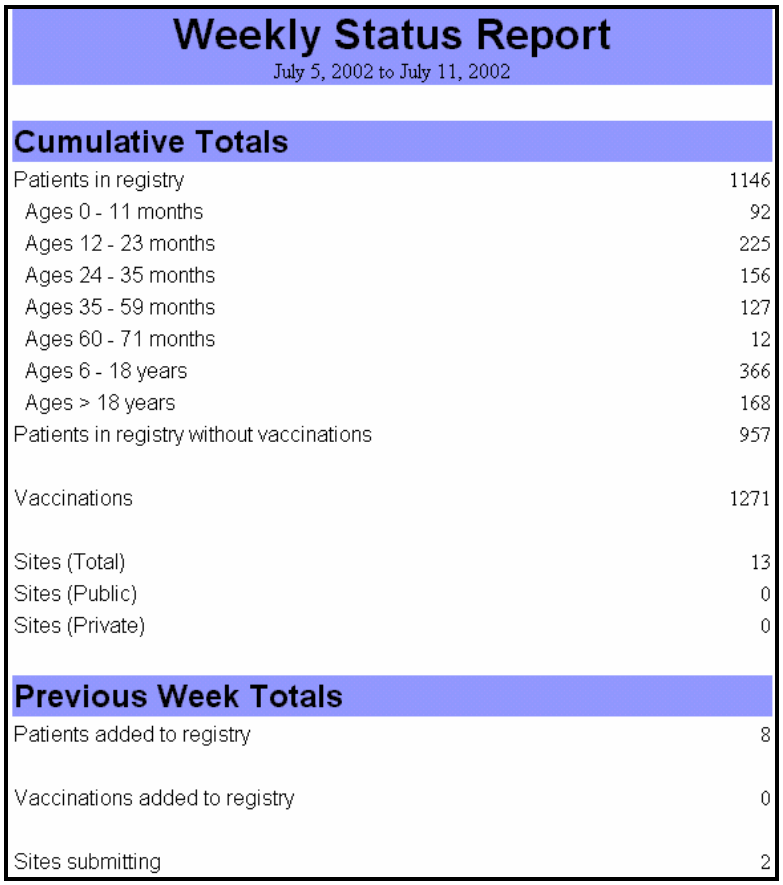
Patients in registry	1146
Ages 0 - 11 months	92
Ages 12 - 23 months	225
Ages 24 - 35 months	156
Ages 35 - 59 months	127
Ages 60 - 71 months	12
Ages 6 - 18 years	366
Ages > 18 years	168
Patients in registry without vaccinations	957
Vaccinations	1271
Sites (Total)	13
Sites (Public)	0
Sites (Private)	0

Previous Day Totals

Patients added to registry	0
Vaccinations added to registry	0
Sites submitting	0

10.2 Weekly Status Report

Weekly Status Report task generates a weekly snapshot of the basic statistics of the registry. The Weekly Status Report configuration page allows the user to select the IRMS' and facilities that the Weekly Status Report should be emailed to. The other box allows the user to enter in additional email addresses separated by commas.



Weekly Status Report

July 5, 2002 to July 11, 2002

Cumulative Totals

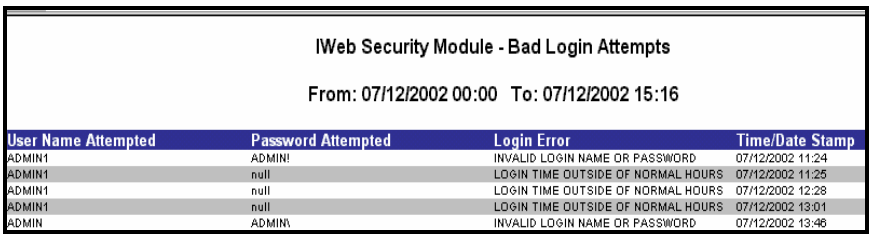
Patients in registry	1146
Ages 0 - 11 months	92
Ages 12 - 23 months	225
Ages 24 - 35 months	156
Ages 35 - 59 months	127
Ages 60 - 71 months	12
Ages 6 - 18 years	366
Ages > 18 years	168
Patients in registry without vaccinations	957
Vaccinations	1271
Sites (Total)	13
Sites (Public)	0
Sites (Private)	0

Previous Week Totals

Patients added to registry	8
Vaccinations added to registry	0
Sites submitting	2

10.3 Bad Login Report

The Bad Login Report is part of the Security Module and works in a couple of different ways. First, it keeps track of any "Bad Login". For example, if a user enters a wrong password, this report will keep track of it. Second, it keeps track of any user trying to login before or after the login times set up by the SIIS registry administrator. For example, in the Administrator Settings, if the times set up are 8:00 am and 4:00 pm, anyone trying to login outside those two times will be recorded in the Bad Login Report.



IWeb Security Module - Bad Login Attempts

From: 07/12/2002 00:00 To: 07/12/2002 15:16

User Name Attempted	Password Attempted	Login Error	Time/Date Stamp
ADMIN1	ADMIN!	INVALID LOGIN NAME OR PASSWORD	07/12/2002 11:24
ADMIN1	null	LOGIN TIME OUTSIDE OF NORMAL HOURS	07/12/2002 11:25
ADMIN1	null	LOGIN TIME OUTSIDE OF NORMAL HOURS	07/12/2002 12:28
ADMIN1	null	LOGIN TIME OUTSIDE OF NORMAL HOURS	07/12/2002 13:01
ADMIN	ADMIN\	INVALID LOGIN NAME OR PASSWORD	07/12/2002 13:46

10.4 Data Quality Report

The Data Quality report is a report that shows a breakdown of patients and shots by IRMS. It lists how many particular data elements are missing for each category and what the percentage is of the total records.

GENERAL HOSPITAL (TEST) 1001

Patient Data Quality

There are 260 patient(s) associated with this IRMS.

The following shows the percent and number of data elements that are missing.

Address	
Street	59% (154)
City	39% (101)
State	33% (85)
Phone	60% (156)
Gender	76% (198)
Mothers Maiden Name	48% (125)
Guardian First Name	60% (155)
Guardian Middle Name	93% (241)
Guardian Last Name	88% (228)
County	57% (149)
District	54% (141)

The following shows the percent and number of data elements that are present.

Inactive Code	
Delivery Unsuccessful	0% (1)
Other	2% (4)
Address Incorrect	1% (2)
Active	97% (253)
VFC Eligibility	
KidsCare	9% (23)
Underinsured	3% (8)
Medicaid	12% (30)
Nat. Amer.or Alaskan	4% (11)
Hoosier HWise Pkg C	6% (16)
Uninsured	8% (20)
Unspecified	58% (152)

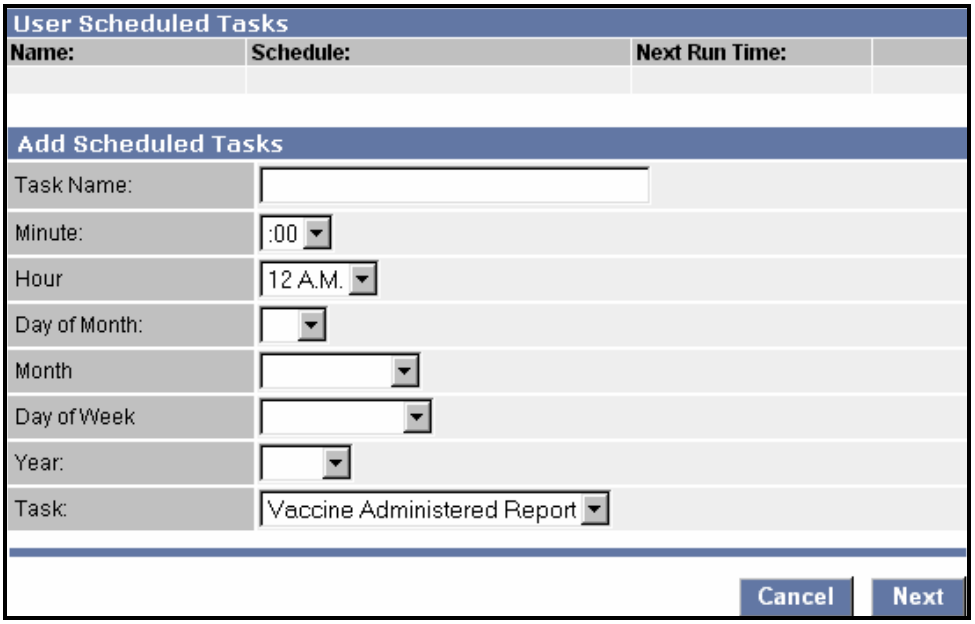
Vaccination Data Quality

There are 852 vaccination(s) associated with this IRMS.

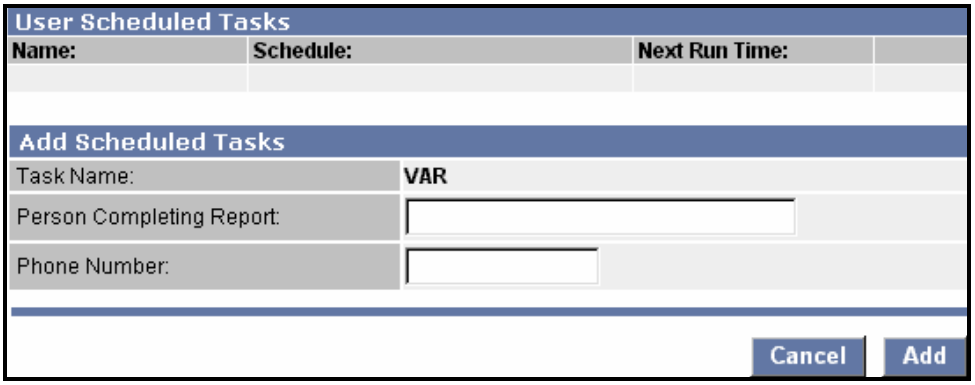
The following shows the percent and of data elements that are null.

Lot Number	77% (659)
Manufacturer	77% (659)
Vaccinator	95% (808)
District	72% (613)

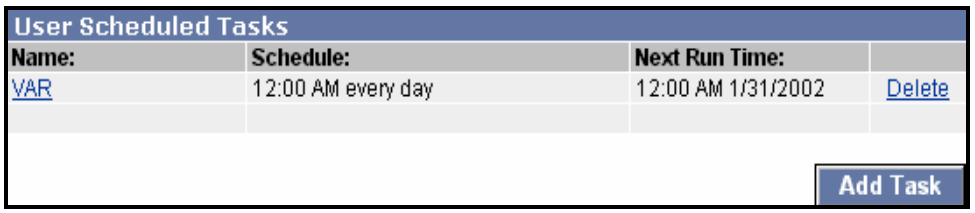
The Add Scheduled Tasks page is used to name, schedule, and select the task to run. A name must be assigned to the task. Fill out or complete the appropriate boxes then click the Next button.



A screen similar to the one below will appear. Finish filling in the appropriate text boxes. Click the Add button.



Once the user has finished adding the task, it will appear in the User Scheduled Tasks screen as shown below.



11 Help Menu

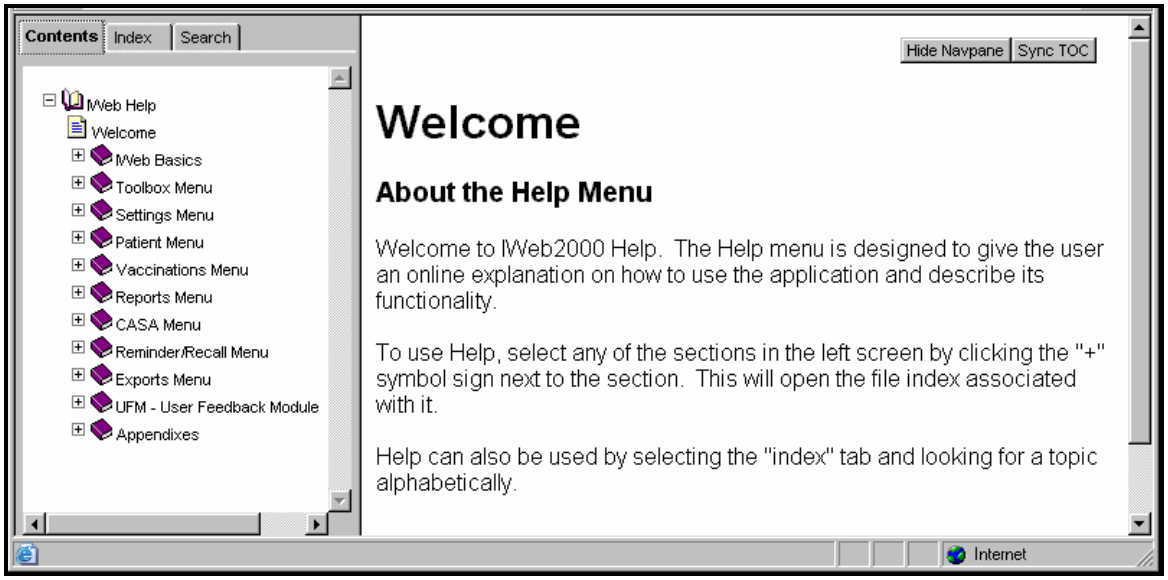
11.1 About the Help Menu

The Help menu is designed to give the user an online user guide that will explain how to use the application and describe its functionality.

To use, click on the Help link in the menu. A screen will appear similar to the one below.

From here, if the user knows the section of help needed, they can select the section in the left screen by clicking the "plus" sign next to the section.

Selecting the "index" tab and looking for a topic alphabetically can also be useful with help.



A. Appendix - Inactivating Records

The PCI Web Application helps you manage all aspects of your patient immunization information, including certain things that need special handling. Sometimes you may have a record in your database that you may want to inactivate for certain reasons.

Inactivating a Record

In the web application, you cannot delete patient records. The reason you cannot delete them is that other records in the system reference them. However, you can inactivate them, which means they won't show up in searches. The reason to inactivate the record is to save the information you already entered. Inactivating a record removes it from consideration when you conduct the Immunization Assessment. Nevertheless, it keeps the record in your database, in case the patient returns and you want access to the information again.

In the middle, right side of the Patient Demographic screen, there is an Inactive Code field. There are seven codes from which to choose. These codes apply primarily to public health departments who are trying to assure that the patients in their databases are really theirs. Private clinics can define their own inactivation criteria, but the web application codes remain the same.

If reliable information has been received that the patient has died, use this code:

- Deceased

If you send a reminder postcard and receive notice back from the Postal Service, inactivate the record for the specified reason:

- Postal Forward Order Expired
- No Postal Order on File
- Moved--Left No Address

If you get the following notices from the Postal Service, make sure the incorrect address is not a result of improper information entry. Verify the address through the phone book or directory assistance. If you cannot, you may inactivate the record for any of the following:

- Attempted Not Known
- Delivery Unsuccessful
- Address Incorrect

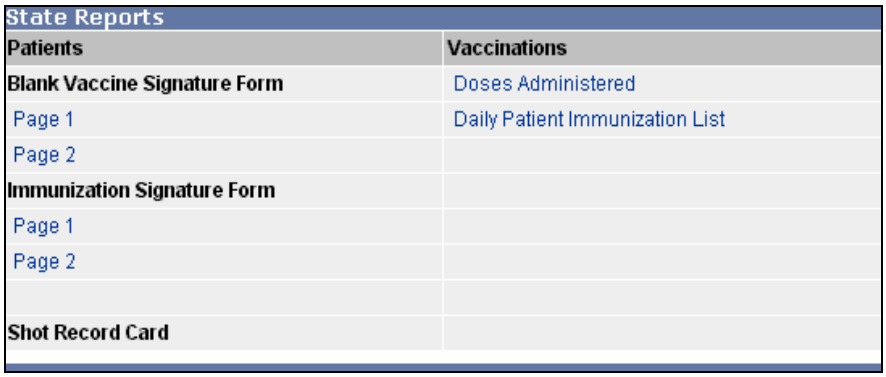
The final category is a generic catchall, which gives you the flexibility to inactivate for:

- Other

This broad category should only be used with proper documentation. Reasons could include a record received from a hospital with the first dose of *Hep b* for a child who has never been seen by the health department, a child who resides in Mexico, or documentation that the child is in the care of another health care provider.

B. Appendix - State Reports

The state reports are a set of customizable reports that apply only to the specific needs of a particular state. Indiana State Reports allows a user to print a Blank Vaccine Signature Form, an Immunization Signature Form, a Doses Administered report, a Daily Patient Immunization List, or a Shot Record Card.

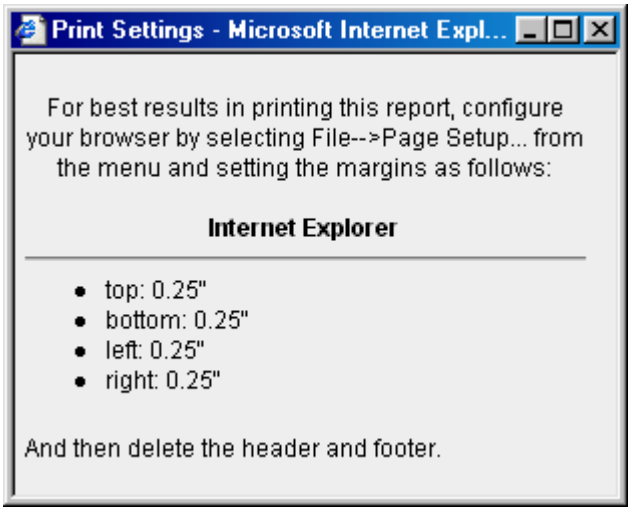


B.1. Immunization Signature Forms

The Blank Vaccine Signature Form and the Immunization Signature Form are the same. The only difference is, the Immunization Signature Form is populated by patient and immunization information. In order to access the populated form, the user must complete a patient search from the Patient Search screen, and select a patient.

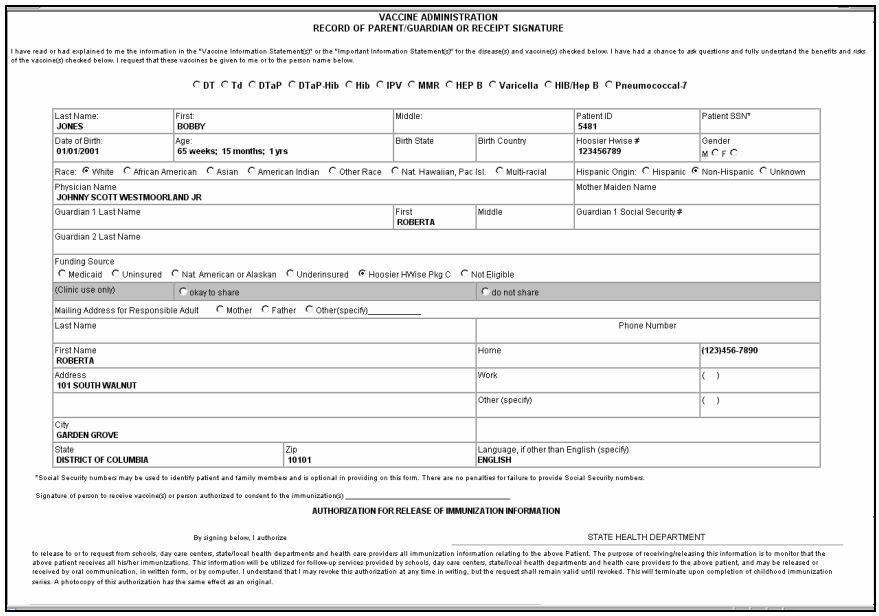
When the user selects the State Reports from the reports menu, the *hyperlink* to the Immunization Signature Form will be available.

When the user clicks on the Page 1 link, the following message window will appear. This window describes the browser settings that are necessary to print the form.



Behind the printer settings window, in the main screen of the browser, Page 1 of the

selected report will appear with certain fields populated with patient information.



VACCINE ADMINISTRATION
RECORD OF PARENT/GUARDIAN OR RECEIPT SIGNATURE

I have read or had explained to me the information in the "Vaccine Information Statement(s)" or the "Important Information Statement(s)" for the disease(s) and vaccine(s) checked below. I have had a chance to ask questions and fully understand the benefits and risks of the vaccine(s) checked below. I request that these vaccines be given to me or to the person name below.

○ DT ○ Td ○ DTaP ○ DTaP-Hib ○ Hib ○ IPV ○ MMR ○ HEP B ○ Varicella ○ HIB/Hep B ○ Pneumococcal-7

Last Name: JONES	First: BOBBY	Middle:		Patient ID 5481	Patient SSN*
Date of Birth: 01/01/2001	Age: 65 weeks; 15 months; 1 yrs	Birth State	Birth Country	Hoosier Hwise # 123456789	Gender M ○ F ○
Race: ◉ White ○ African American ○ Asian ○ American Indian ○ Other Race ○ Nat. Hawaiian, Pac Isl. ○ Multi-racial				Hispanic Origin: ○ Hispanic ◉ Non-Hispanic ○ Unknown	
Physician Name JOHNNY SCOTT WESTMOORLAND JR				Mother Maiden Name	
Guardian 1 Last Name		First ROBERTA	Middle	Guardian 1 Social Security #	
Guardian 2 Last Name					
Funding Source ○ Medicaid ○ Uninsured ○ Nat. American or Alaskan ○ Underinsured ◉ Hoosier HWise Pkg C ○ Not Eligible					
(Clinic use only)	○ okay to share		○ do not share		
Mailing Address for Responsible Adult ○ Mother ○ Father ○ Other(specify)_____					
Last Name				Phone Number	
First Name ROBERTA				Home	(123)456-7890
Address 101 SOUTH WALNUT				Work	( )
				Other (specify)	( )
City GARDEN GROVE					
State DISTRICT OF COLUMBIA	Zip 10101			Language, if other than English (specify) ENGLISH	

*Social Security numbers may be used to identify patient and family members and is optional in providing on this form. There are no penalties for failure to provide Social Security numbers.

Signature of person to receive vaccine(s) or person authorized to consent to the immunization(s) _____

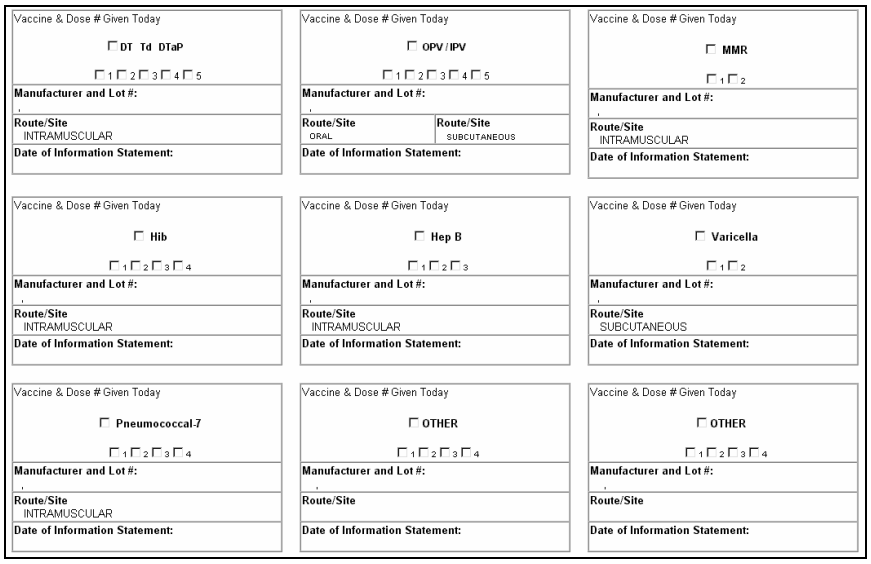
AUTHORIZATION FOR RELEASE OF IMMUNIZATION INFORMATION

By signing below, I authorize _____ STATE HEALTH DEPARTMENT

to release to or to request from schools, day care centers, state/local health departments and health care providers all immunization information relating to the above Patient. The purpose of receiving/releasing this information is to monitor that the above patient receives all his/her immunizations. This information will be utilized for follow-up services provided by schools, day care centers, state/local health departments and health care providers to the above patient, and may be released or received by oral communication, in written form, or by computer. I understand that I may revoke this authorization at any time in writing, but the request shall remain valid until revoked. This will terminate upon completion of childhood immunization series. A photocopy of this authorization has the same effect as an original.

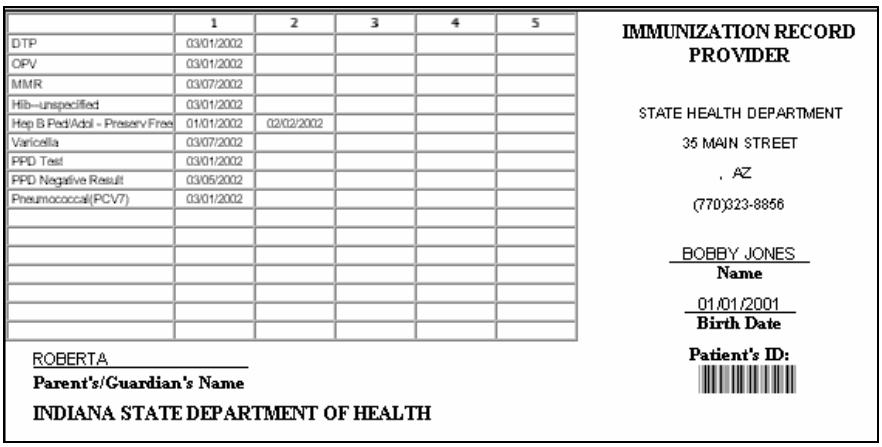
Page 2 is a detail of the patient's vaccinations received for the day selected. When the user clicks on Page 2 of the report, a screen will appear asking the user to select a date for the report. By default, the date will be Today's date. Click on the Print button to view the report.

From this point, the report becomes interactive to the user. The user can choose the vaccinations the patient received for the report date selected. When the user is finished completing the form, they may choose to print the form using the print settings suggested by the application.



B.2. Shot Record Card

The Shot Record Card is a patient copy of the vaccinations received over the patient's lifetime. This report is only available after a patient search has been completed and a patient's record has been selected. To use this report, click on the Shot Record Card *hyperlink*. The following report will appear in the browser. Print this record using the yellow cards provided by the state.



	1	2	3	4	5
DTP	03/01/2002				
OPV	03/01/2002				
MMR	03/07/2002				
Hib--unspecified	03/01/2002				
Hep B Ped/Adol - Preserv Free	01/01/2002	02/02/2002			
Varicella	03/07/2002				
PPD Test	03/01/2002				
PPD Negative Result	03/05/2002				
Pneumococcal(PCV7)	03/01/2002				

IMMUNIZATION RECORD
PROVIDER

STATE HEALTH DEPARTMENT
35 MAIN STREET
, AZ
(770)323-8856

BOBBY JONES
Name
01/01/2001
Birth Date
Patient's ID:

ROBERTA
Parent's/Guardian's Name

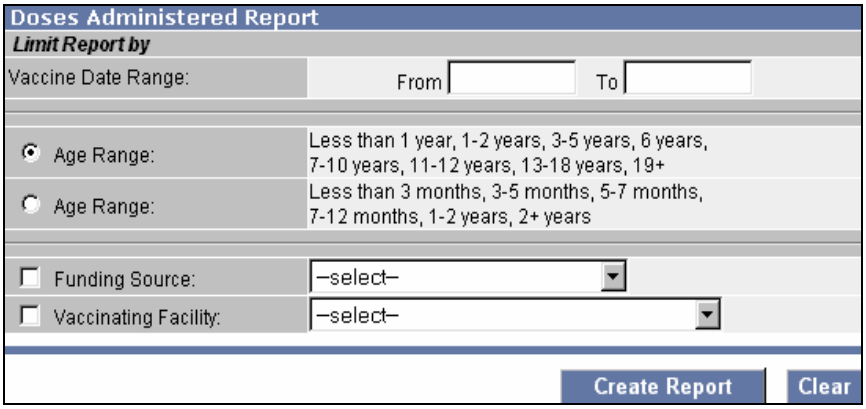
INDIANA STATE DEPARTMENT OF HEALTH

B.3. Doses Administered Report

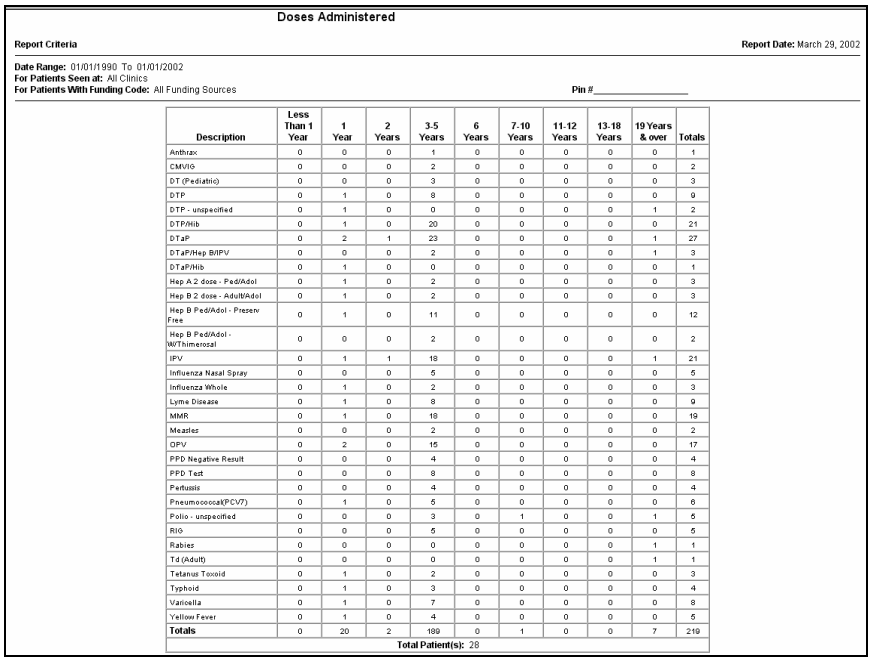
The Doses Administered Report is a report that displays the number of doses given

within a certain date range, to a selected age range of patients. The report can also be limited by selected a funding source and/or a vaccinating facility.

To use this report, first click on the Doses Administered *hyperlink*. Enter the date range of the vaccine dates. Next, select the age range of the patients. If no selections need to be made regarding the funding source or vaccinating facility, click the Create Report button.



Once the settings are entered click on the Create Report button. A screen similar to the one below will appear. To print the report, select the print options in the browser. Once finished with the report, click the "back" button on the browser to return to the IWeb2000 application.



Doses Administered

Report Criteria **Report Date:** March 29, 2002

Date Range: 01/01/1990 To 01/01/2002
For Patients Seen at: All Clinics
For Patients With Funding Code: All Funding Sources
Pin #_____

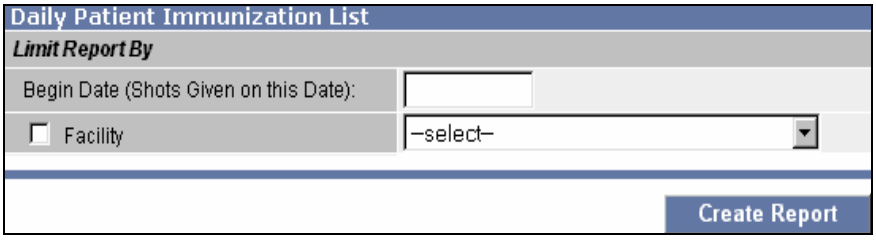
Description	Less Than 1 Year	1 Year	2 Years	3-5 Years	6 Years	7-10 Years	11-12 Years	13-18 Years	19 Years & over	Totals
Anthrax	0	0	0	1	0	0	0	0	0	1
CMV/IG	0	0	0	2	0	0	0	0	0	2
DT (Pediatric)	0	0	0	3	0	0	0	0	0	3
DTP	0	1	0	8	0	0	0	0	0	9
DTP - unspecified	0	1	0	0	0	0	0	0	1	2
DTP/Hib	0	1	0	20	0	0	0	0	0	21
DTaP	0	2	1	23	0	0	0	0	1	27
DTaP/Hep B/IPV	0	0	0	2	0	0	0	0	1	3
DTaP/Hib	0	1	0	0	0	0	0	0	0	1
Hep A 2 dose - Ped/Adol	0	1	0	2	0	0	0	0	0	3
Hep B 2 dose - Adult/Adol	0	1	0	2	0	0	0	0	0	3
Hep B Ped/Adol - Preserv Free	0	1	0	11	0	0	0	0	0	12
Hep B Ped/Adol - W/Thimerosal	0	0	0	2	0	0	0	0	0	2
IPV	0	1	1	18	0	0	0	0	1	21
Influenza Nasal Spray	0	0	0	5	0	0	0	0	0	5
Influenza Whole	0	1	0	2	0	0	0	0	0	3
Lyme Disease	0	1	0	8	0	0	0	0	0	9
MMR	0	1	0	18	0	0	0	0	0	19
Measles	0	0	0	2	0	0	0	0	0	2
OPV	0	2	0	15	0	0	0	0	0	17
PPD Negative Result	0	0	0	4	0	0	0	0	0	4
PPD Test	0	0	0	8	0	0	0	0	0	8
Pertussis	0	0	0	4	0	0	0	0	0	4
Pneumococcal(PCV7)	0	1	0	5	0	0	0	0	0	6
Polio - unspecified	0	0	0	3	0	1	0	0	1	5
RIG	0	0	0	5	0	0	0	0	0	5
Rabies	0	0	0	0	0	0	0	0	1	1
Td (Adult)	0	0	0	0	0	0	0	0	1	1
Tetanus Toxoid	0	1	0	2	0	0	0	0	0	3
Typhoid	0	1	0	3	0	0	0	0	0	4
Varicella	0	1	0	7	0	0	0	0	0	8
Yellow Fever	0	1	0	4	0	0	0	0	0	5
Totals	0	20	2	199	0	1	0	0	7	219

Total Patient(s): 28

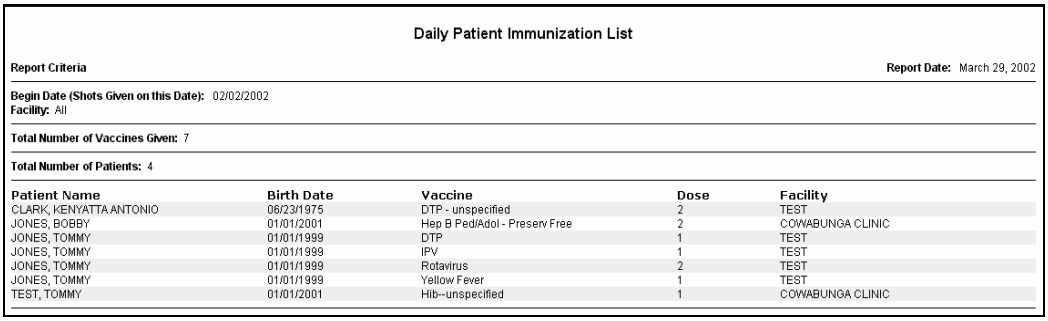
B.4. Daily Patient Immunization List

The Daily Patient Immunization List is a report that will display all the vaccinations given on a certain date. These are reported using the IRMS ID the user is assigned to. The list can also be filtered by facility.

To use, enter the date. Select a facility and click the Create Report button, or just click the Create Report button.



Once the Create Report button is clicked, a similar screen will appear listing all the patients who received vaccinations for the date chosen, their birth date, vaccines they received, the dose number and what facility. To print this report, select the print options from the browser.



Daily Patient Immunization List

Report Criteria **Report Date:** March 29, 2002

Begin Date (Shots Given on this Date): 02/02/2002
Facility: All

Total Number of Vaccines Given: 7

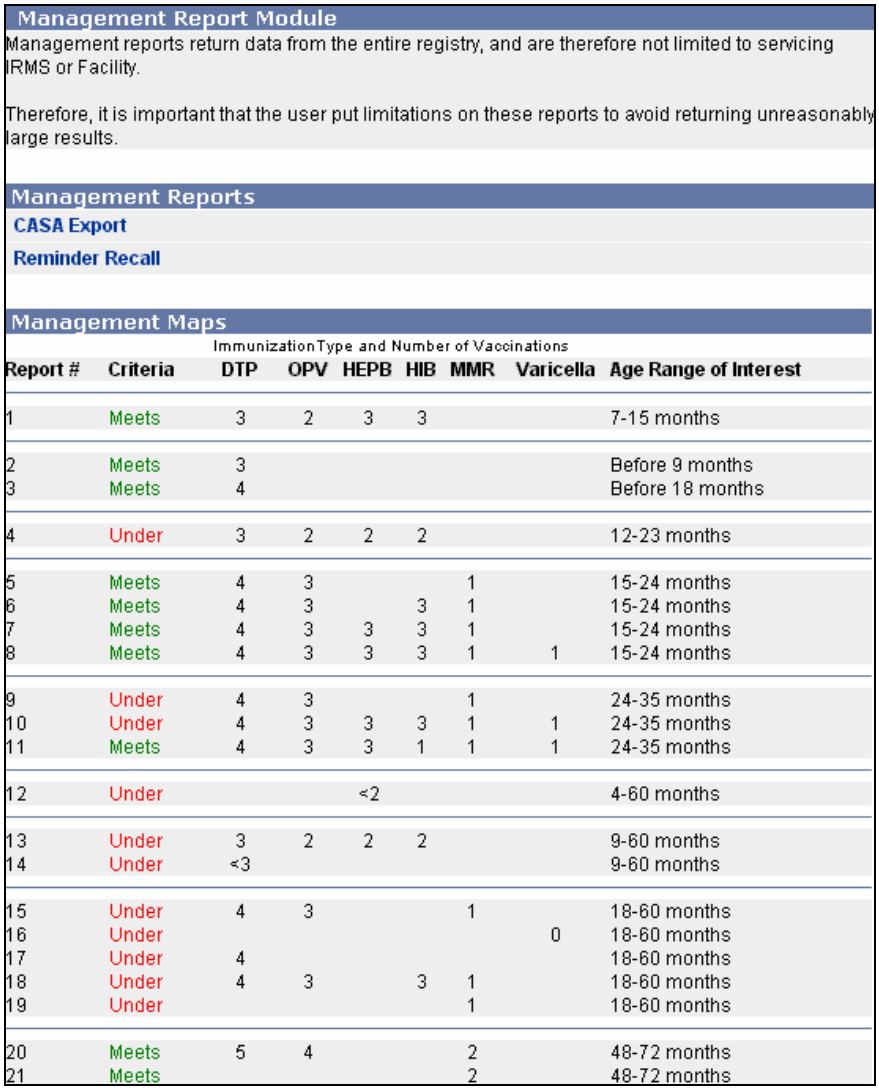
Total Number of Patients: 4

Patient Name	Birth Date	Vaccine	Dose	Facility
CLARK, KENYATTA ANTONIO	06/23/1975	DTP - unspecified	2	TEST
JONES, BOBBY	01/01/2001	Hep B Ped/Adol - Preserv Free	2	COWABUNGA CLINIC
JONES, TOMMY	01/01/1999	DTP	1	TEST
JONES, TOMMY	01/01/1999	IPV	1	TEST
JONES, TOMMY	01/01/1999	Rotavirus	2	TEST
JONES, TOMMY	01/01/1999	Yellow Fever	1	TEST
TEST, TOMMY	01/01/2001	Hib--unspecified	1	COWABUNGA CLINIC

C. Appendix - Management Reports

C.1. Reports Menu - Management Reports

The Management Report Module is also a customizable reporting tool for upper level managers to reflect immunization rates, to make assessments on the data, or to recall patients throughout an IRMS, county, region, state, etc. This is just a sample of some features that can be included.



Management Report Module

Management reports return data from the entire registry, and are therefore not limited to servicing IRMS or Facility.

Therefore, it is important that the user put limitations on these reports to avoid returning unreasonably large results.

Management Reports

CASA Export

Reminder Recall

Management Maps

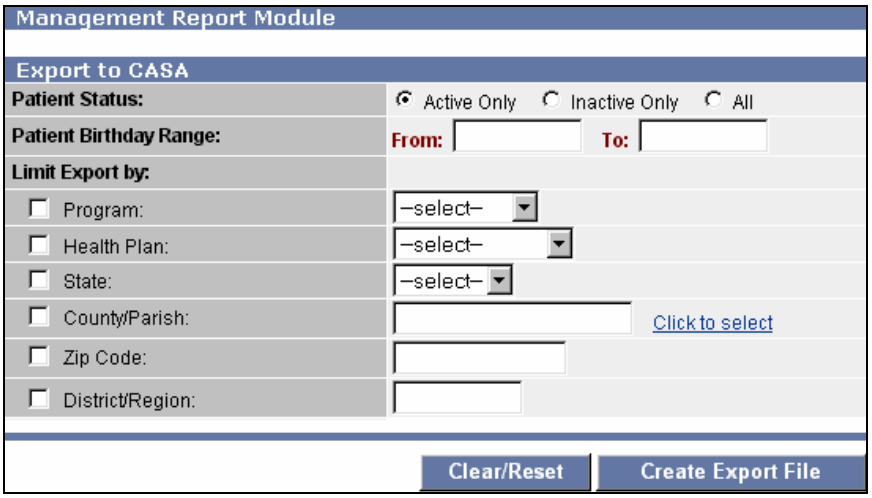
		Immunization Type and Number of Vaccinations						
Report #	**Criteria**	**DTP**	**OPV**	**HEPB**	**HIB**	**MMR**	**Varicella**	**Age Range of Interest**
1	Meets	3	2	3	3			7-15 months
2	Meets	3						Before 9 months
3	Meets	4						Before 18 months
4	Under	3	2	2	2			12-23 months
5	Meets	4	3			1		15-24 months
6	Meets	4	3		3	1		15-24 months
7	Meets	4	3	3	3	1		15-24 months
8	Meets	4	3	3	3	1	1	15-24 months
9	Under	4	3			1		24-35 months
10	Under	4	3	3	3	1	1	24-35 months
11	Meets	4	3	3	1	1	1	24-35 months
12	Under			<2				4-60 months
13	Under	3	2	2	2			9-60 months
14	Under	<3						9-60 months
15	Under	4	3			1		18-60 months
16	Under						0	18-60 months
17	Under	4						18-60 months
18	Under	4	3		3	1		18-60 months
19	Under					1		18-60 months
20	Meets	5	4			2		48-72 months
21	Meets					2		48-72 months

C.1.1. CASA Export

To conduct an immunization assessment, the Web Application uses an export feature called Export to CASA, the Clinic Assessment Software Application. CASA is a separate software package that has been developed by the Centers for Disease Control and Prevention to assess immunization coverage rates in a standard manner.

From the Management Reports main screen select CASA Export. This will bring up the CASA Export screen as shown below. This CASA Export feature is similar to the normal CASA Export except that it does contain the limit export by facility or physician/vaccinator.

To use, make the appropriate choices and fill in the appropriate boxes. Once all the selections are made, click on the Create Export File button.



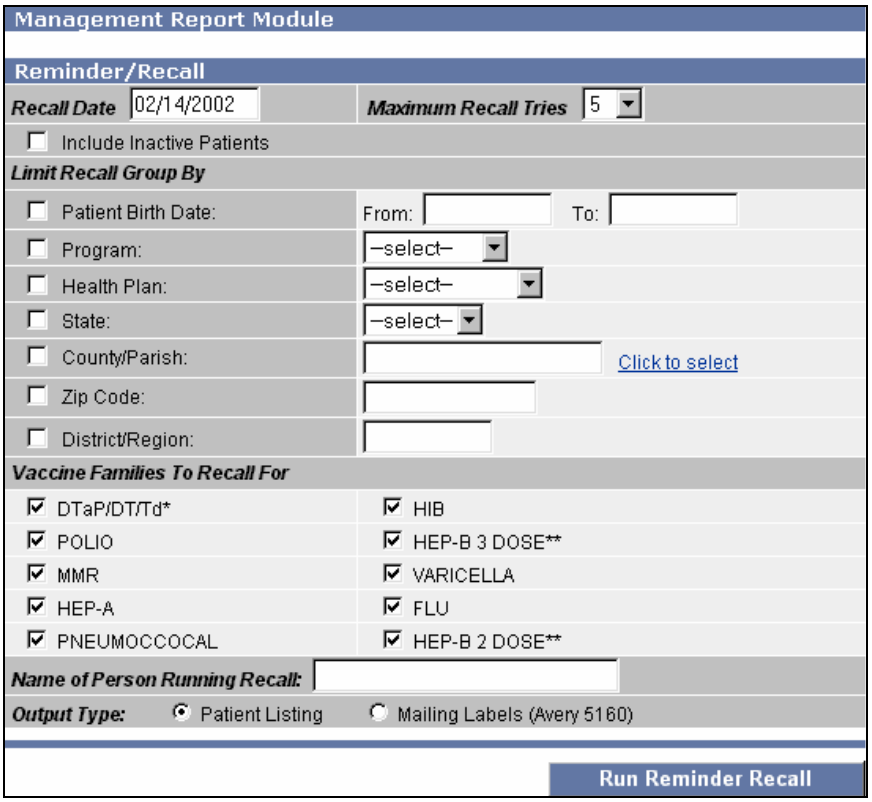
In order for you to use this data with CASA, you will need to save this output as a text file. At the browser menu please Select:

- File
- Save As
- The "SAVE WEB PAGE" dialog box will appear
- Filename: Please type in *anyfilename*.txt
- Save As Type: Please select Text File (*.txt)
- Then Click Save

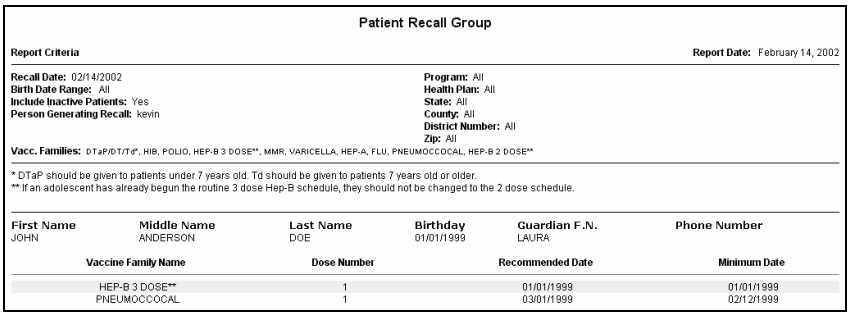
C.1.2. Reminder Recall

The Management Reminder Recall can be used to make a report or a mailing label list. The purpose of these is for contacting patients about upcoming or past due vaccinations. Click on Reminder Recall from the Management Reports main screen. The Reminder Recall screen will appear, as shown below.

This Reminder Recall feature is similar to the normal Reminder Recall except that it does not contain the limit recall group by vaccinating facility or physician/vaccinator. Additionally, it has a few other options to limit recall group by, like State, County/Parish, or Zip Code.



To use, make the appropriate choices and fill in the appropriate boxes. Once all the selections are made, click on the Run Reminder Recall button. The screen similar to the one below will appear. Once you view or print the report, click the "back" button on your browser.



Patient Recall Group

Report Criteria — Report Date: February 14, 2002

Recall Date: 02/14/2002
Birth Date Range: All
Include Inactive Patients: Yes
Person Generating Recall: kevin

Program: All
Health Plan: All
State: All
County: All
District Number: All
Zip: All

Vacc. Families: DTaP/DT/Td*, HIB, POLIO, HEP-B 3 DOSE**, MMR, VARICELLA, HEP-A, FLU, PNEUMOCCOCAL, HEP-B 2 DOSE**

* DTaP should be given to patients under 7 years old. Td should be given to patients 7 years old or older.
** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number
JOHN	ANDERSON	DOE	01/01/1999	LAURA	

Vaccine Family Name	Dose Number	Recommended Date	Minimum Date
HEP-B 3 DOSE**	1	01/01/1999	01/01/1999
PNEUMOCCOCAL	1	03/01/1999	02/12/1999

C.1.3. Management Maps

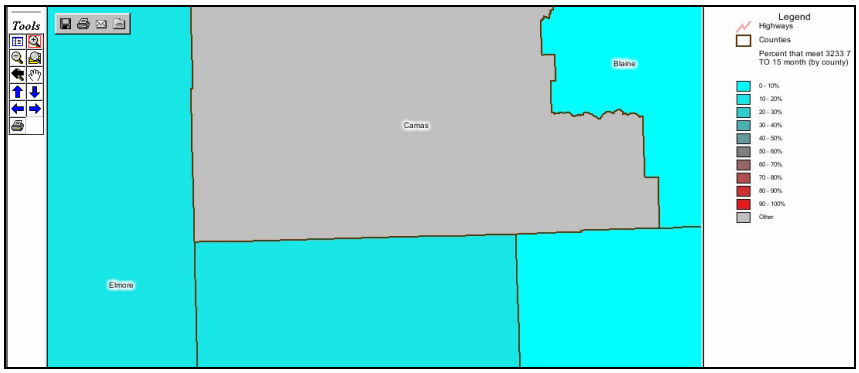
By clicking on any of the hyperlinks associated with the report number, the user will be taken to a GIS mapping screen.

Management Maps

Immunization Type and Number of Vaccinations

Report #	Criteria	DTP	OPV	HEPB	HIB	MMR	Varicella	Age Range of Interest
1	Meets	3	2	3	3			7-15 months
2	Meets	3						Before 9 months
3	Meets	4						Before 18 months
4	Under	3	2	2	2			12-23 months
5	Meets	4	3			1		15-24 months
6	Meets	4	3		3	1		15-24 months
7	Meets	4	3	3	3	1		15-24 months
8	Meets	4	3	3	3	1	1	15-24 months
9	Under	4	3			1		24-35 months
10	Under	4	3	3	3	1	1	24-35 months
11	Meets	4	3	3	1	1	1	24-35 months
12	Under			<2				4-60 months
13	Under	3	2	2	2			9-60 months
14	Under	<3						9-60 months
15	Under	4	3			1		18-60 months
16	Under						0	18-60 months
17	Under	4						18-60 months
18	Under	4	3		3	1		18-60 months
19	Under					1		18-60 months
20	Meets	5	4			2		48-72 months
21	Meets					2		48-72 months

With this mapping screen the user has many options to manipulate the data.



D. Appendix - User Information Access

D.1. IWeb User Access Levels

The enrolled users are set up at the registry level by using the Web User Maintenance window, in PCI Administrator from PCI2000. There are six levels of user access to the Registry through this mode, which are explained below in the table.

Access Type	Registry View	IRMS Client	IRMS View	Facility Client	Facility View	Vendor View
VIEW PUBLIC DATA	Y	Y	Y	Y	Y	
VIEW PRIVATE DATA		Y	Y	Y	Y	
ADD / EDIT PATIENTS		Y		Y		
ADD / EDIT VACCINATIONS		Y		Y		
DELETE VACCINATIONS		Y		Y		
USE TOOLBOX		Y		Y		
RUN REPORTS		Y		Y	Y	
LIMIT REPORTS BY FACILITY				Y	Y	
UPLOAD FILES		Y		Y		Y
DOWNLOAD FILES		Y		Y		
RUN CASA EXPORT		Y		Y		
RUN REMINDER / RECALL		Y		Y		

D.2. Patient Information Ownership

Public information means the information can be view by all.

Private information means the information can be view by those who "**own**" the record. Which means they were the last to edit the record, or they added the record? Here is a brief overview of how public and private information differ.

Each "record" is divided into 2 separate records:

- Demographics
- Vaccinations

D.2.1. Patient Demographic Information - Public

The following information is public. Any user can view this information after performing a search for a patients record.

Patient First Name	**Patient Middle Name**
Patient Last Name	**Patient Suffix**
Patient Birthdate	**Patient Gender**
Inactive Status/Reason	**Guardian First Name**
Guardian Middle Name	**Guardian Last Name**
Physician Name	**Health Plan**
Programs	**Facility**
VFC Status (flag only -- 'eligible' or 'not eligible')	

D.2.2. Patient Demographic Information - Private

The following information is private. User's can view this information only if they own it.

Patient SSN	**Patient Language**	**Patient Ethnicity**
Patient Race	**Patient Address**	**Patient Phone Number**
Patient Email Address	**VFC Eligible Reason**	**Guardian SSN**
Mother's Maiden Name	**Medicaid Number**	**Birth File Number**
Chart Number	**Health Plan ID**	**Health Plan Enroll Date**
Comments	**Next Appointment Date**	

NOTE: *Regardless of patient record ownership, the user will always see every single vaccination.*

D.2.3. Patient Vaccination Information - Public

The following information is public. Any user can view this information after performing a search for a patients record.

Vaccine Type	**Vaccination Date**
Historical	**Vaccinator**
Facility	**Adverse Reaction (flag only -- 'Adverse Reaction occurred')**
Contraindication (flag only)	

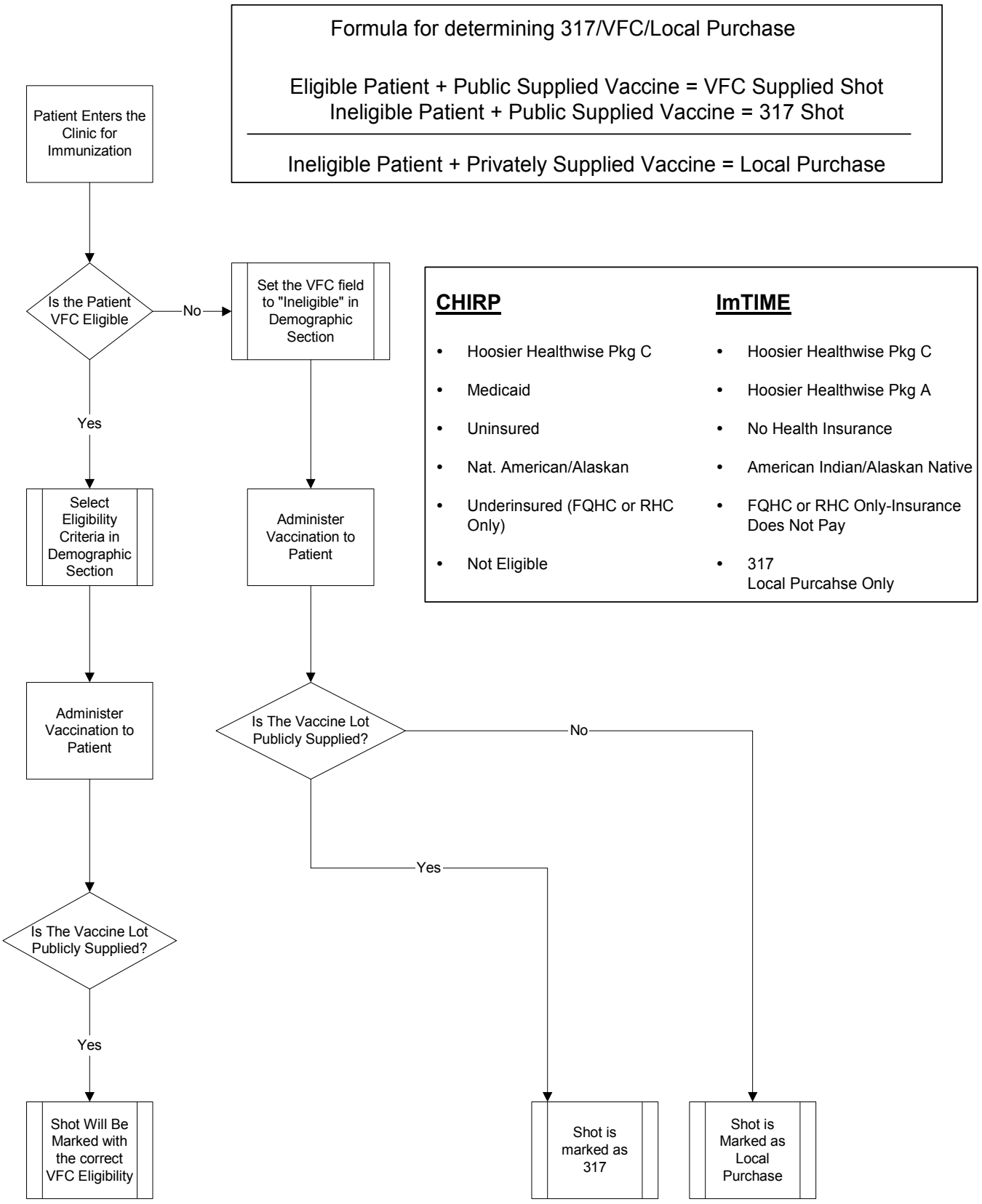
D.2.4. Patient Vaccination Information - Private

The following information is private. User's can view this information only if they own it.

Manufacturer	**Lot Number**
VFC Status	**Anatomical Site**
Adverse Reaction	**Contraindication**

Glossary of Terms

Demographic	Refers to information such as address, sex, age, phone number, etc.
Facility Client	Add/Edit rights. Private fields can only be edited or viewed if entered by self or someone entering under the same facility. User must be assigned IRMS and facility ID's.
Facility View	View only rights. Some reports must be limited to assigned facility. Private fields are only viewable if entered by self or someone entering under the same IRMS. User must be assigned IRMS and facility ID's.
IRMS	Immunization Record Management System.
IRMS Client	Add/Edit rights. Private fields can only be edited or viewed if entered by self or someone entering under the same IRMS. User must be assigned an IRMS ID.
IRMS View	View only rights. Private fields are only viewable if entered by self or someone entering under the same IRMS. User must be assigned an IRMS ID.
IWeb2000	The Internet version of SIIS. It provides patient immunization resource management and administration tools that work together to help graphically perform patient immunization management tasks.
PCI2000	The desktop version of SIIS. The desktop version can be used with all the same functionality as **IWeb2000** and is used for administrative purposes.
Registry View	View only rights. The user does not have access to private information and does not have to be assigned an IRMS ID.
SIIS	State Immunization Information System.
Vendor View	Upload files only. This feature allows a vendor to log into the web application and send file exports from the Patient Management Systems.

Patient Chargeable Status for Vaccinations Given

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